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ABSTRACT

This curriculum guide, which combines the curriculum for three marketing related clusters, is intended to serve the employment needs of students at the secondary, postsecondary, or adult level. The guide is designed to assist teachers in using competency-based curriculum guides. Information on using the guide is followed by the master listing and matrix of marketing education competencies and tasks. Tasks are organized into 16 areas: employability, communications, mathematics, social skills, economics, marketing foundations, management foundations, product and service planning, distribution, purchasing, pricing, selling, promotion, marketing information management, finance, and risk. This information is provided for each task: competency and task; performance objective (conditions, evaluation, and standard); a listing of student learning experiences; suggested instructional techniques; instructional equipment, materials, and supplies; and list of resources. An annotated bibliography concludes the guide. (YLB)

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GENERAL MARKETING, RETAILING AND ENTREPRENEURSHIP

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GENERAL MARKETING, RETAILING AND ENTREPRENEURSHIP

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September, 1987

FOREWORD

The Curriculum for General Marketing, Retailing and Entrepreneurship

This Curriculum Guide represents the continuing evolution of competency based instruction in marketing, a process initiated in Arizona in 1976. During that time frame, a variety of activities have been conducted to improve the quality of instruction in Marketing Education programs.

One of the characteristics of marketing careers is the high degree of skill transferability within a variety of occupational areas. A major objective of this curriculum guide is to consolidate several previous components to better match the current delivery system for instruction in marketing. For that reason, this guide combines the curriculum for three marketing related clusters: General Marketing, Retailing, and Entrepreneurship.

This curriculum guide was designed to focus on a level of instruction that is described as the Career Sustaining Level. Career sustaining marketing occupations involve the performance of complex duties, routine decision making skills, a limited control of the working environment, and the application of marketing concepts and functions. These positions can be full time or part time, and usually serve as the foundation for advancement to marketing specialist, marketing supervisor or marketing management.

In the General Marketing and Retailing categories, this curriculum is designed to meet the employment needs of students at the Career Sustaining Level. These students would hold positions with titles such as:

Salesperson
Sales Associate
Sales Representative
Marketing Representative
Customer Service Representative
Cashier/Clerk
Reservation Sales Agent
Waiter/Waitress
Teller

It is important to note that this curriculum guide is not designated as a secondary or post secondary product. The purpose of this guide is to serve the employment needs of students at the Career Sustaining Level. While most of this instruction will occur at the secondary level, this guide could be used in adult or post secondary programs for appropriate populations.

The General Marketing and Retailing curricula differ in their approach and emphasis. Retailing is one channel in the marketing process, a channel which emphasizes contact with individual consumers purchasing products for their own use. As a sub-set of the overall marketing process, retailing requires more specialized skills in customer contact, merchandise handling, visual presentation, and recordkeeping.

The General Marketing curriculum serves a broader range of sales and marketing positions in all types of organizations. It is the most prevalent delivery system in Arizona. The Retailing approach is used by those schools which wish to focus on employment in retail businesses. The Retailing curriculum also suggests the use of the school store, for which many programs lack the specialized facilities. Many schools which have school stores are able to use both the General Marketing and Retailing delivery systems and thus meet the needs of students with varying career interests.

The third component of this curriculum guide is Entrepreneurship. The teaching of entrepreneurship and small business management is not new to Marketing Education. Historically, marketing courses have included projects and activities related to starting and managing new business ventures. What is new in Arizona is the development of specific courses in Entrepreneurship. This recent development has been the catalyst for growth in many local Marketing Education programs. One of the advantages of providing entrepreneurship instruction as a separate course is that it becomes more accessible to students who would not normally be involved in traditional marketing courses. Students from other vocational programs and college bound students who have a skill or idea they feel could be the basis of a new business are able to receive instruction which meets their needs. The entrepreneurship competencies and tasks in this curriculum guide can be used as the basis of a separate course or included as a part of the General Marketing and Retailing curriculum.

The area of Entrepreneurship is also unique in the fact that a "new business venture" can be any type of business, from a shoe shine stand to an airline. While there are many common characteristics in the process of starting a new business, there is an obvious difference in the scope and complexity of the process related to the size of the new venture. In developing the competency listing and curriculum for this guide, the scope of Entrepreneurship is defined as meeting the following general objectives:

1. An awareness that self-employment or entrepreneurship is an alternative to employment in an existing organization, and an understanding of the advantages and disadvantages of each career path.

2. An understanding of the basic process for starting a new business, including the economic considerations.

3. Skill in completing a basic business plan for a self-employment situation or an entrepreneurial venture requiring limited capital and other resources.

4. An understanding of the knowledge and skills necessary to establish a major new business venture, and of the resources available to obtain that knowledge and skill.

Collectively, this curriculum guide was designed to meet the needs of Marketing Education programs throughout Arizona. Each school or district can utilize the various competency listings to determine the scope and sequence for the courses offered. The curriculum guide provides structure and support to meet each course design.

For assistance in implementing this curriculum guide teachers are encouraged to contact the Marketing Education staff at the Arizona Department of Education or the curriculum staff at the Arizona Center for Vocational Education.

ACKNOWLEDGEMENTS

A curriculum product of this magnitude is not completed without significant involvement of many individuals and organizations. The Marketing Education profession is indebted to those who helped to design, write, review, edit, and produce this Curriculum Guide. David A. Muehlbauer, State Supervisor of Marketing Education, Arizona Department of Education directed this project.

This guide was written by a team of seven professional marketing educators. In addition to researching and writing specific sections of this guide, the team of authors reviewed and edited the entire document to ensure consistency. The authors of this guide were:

Ed Bufford	South Mountain High School
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Henry Faccio	Mesa High School
Dan Greaven	Marcos de Niza High School
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Marge Metcalf	Corona del Sol High School
Glenn Smith	Eastern Arizona College

Cathy Shadle, Assistant State Supervisor of Marketing Education aided in reviewing the competency list and at various stages throughout the project.

A major outcome of developing this curriculum guide was the updating of the competency/task listing. This project was accomplished by the writing team, with significant involvement of the Arizona Marketing Education Advisory Council. The council members support Marketing Education through a variety of projects and activities throughout the year. We greatly appreciate the involvement of the Advisory council in reviewing the competency listing.

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Barbara Stahl	McDonald's

Compiling and producing a major document from seven different authors is a difficult task. This project was initially word processed by students at Mesa High School as an instructional project. This curriculum guide provided these students with realistic practice on a relatively complex document. Henry Faccio supervised this stage of the curriculum production.

Managing the development of this project was the responsibility of the Arizona Center for Vocational Education at Northern Arizona University. This project was very capably supervised by Nancy F. Dillon, Curriculum Manager. Her attention to detail on the many procedural and financial components of this project are appreciated by all of those involved. We are grateful to the entire staff of the Arizona Center for Vocational Education for their support, concern and assistance. Special thanks to Dr. Jerry R. Cox, Nancy F. Dillon, and the word processing operators Candice Dull, Carla Gahm and Barbara Watson. Beverly Burns, an equity specialist, with New Frontiers reviewed the material.

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USING THIS CURRICULUM GUIDE

INTRODUCTION

Vocational teachers have always tried to teach their students the skills necessary for success on the job. The implementation of Competency Based Education (CBE) represents a further refinement of this process. Implementing competency based education requires changes in the structure of course, instructional techniques, and evaluation of students. This guide was designed to assist teachers in using competency based curriculum guides developed by the State of Arizona.

FORMAT

To encourage quality and consistency in curriculum development, Arizona has adopted a format which is used in the development of vocational education curriculum guides. This format serves to provide vocational teachers with a carefully designed structure for teaching the validated competencies and tasks for an occupation.

The curriculum guide format is a teacher guide, and does not include specific student materials. Given the limited resources available for curriculum development and the availability of many excellent student resources from other sources, the curriculum guide focuses on structure and evaluation. Teachers are then free to select from other available resources for specific teaching materials. Completed curriculum guides also serve as the foundation for development of specific student materials where they are needed. The remainder of this document describes each of the components of the Curriculum Guide Format.

COMPETENCY AND TASK STATEMENTS

The primary focus for the curriculum guide is the listing of validated occupational tasks. Occupational competencies and tasks have been developed through a process which includes task analysis and local industry validation. Within the curriculum guide, an instructional design is provided for each task.

The following terminology is helpful in understanding the organization of competency based instruction:

COMPETENCY: A cluster of occupationally related tasks; a job duty or area of responsibility.

TASK: A statement of behavior which describes a meaningful unit of work having a definite beginning and ending point.

ENABLING OBJECTIVE: A step or procedure necessary to complete the task; knowledge, attitudes and/or skills.

The competency and task statements have been developed through task analysis and validated by industry on a statewide basis. Local schools or districts may add to this listing locally validated tasks which meet specific local needs. Information on the validation process is available from the Arizona Department of Education.

PERFORMANCE OBJECTIVES

The performance objective is a critical component of the curriculum guide, since competency based education emphasizes the evaluation of students on occupational based standards. In the adopted curriculum guide format, three distinct components are identified for each performance objective:

CONDITIONS

EVALUATION

STANDARD

All three components are provided for each task. The most critical concept is that the performance objective is designed to evaluate PERFORMANCE OF THE ACTUAL JOB TASK unless it is totally impractical to do so. Therefore, in most cases the evaluation is the same as the task.

The conditions refer to the tools, equipment, supplies, and situation in which the evaluation is to take place. Conditions generally start with the word "Given".

> Given the required hand tools, service manual, and an operational heating system,
>
> Given access to meters and a series wired circuit board,

The evaluation refers to the task the student will perform for purposes of evaluation. This statement is an occupationally based behavior, and is generally the same as the task statement.

> replace the heater core.
>
> measure and record the circuit voltage, current, and total resistance.

In those cases where it is impossible or impractical to ask each student to perform the job task (i.e. "perform mouth-to-mouth resuscitation techniques to an unconscious individual"), the evaluation technique will be different from the actual job task. Such evaluations generally involve simulation or laboratory activities.

The standard refers to an observable or measurable evidence of successful completion of the task. Since the performance objective provides information to both the teacher and the student, the standard provides a narrative description of the desired outcome.

> When completed there will be no leaks or damage to the heater core and the heater will perform as specified by the manufacturer.
>
> The student's readings must be within +/- 2% of the values predetermined by the instructor.

The required level of performance is a realistic standard; based on performance expected of a worker.

Developing a performance based evaluation translates the Performance Objective into a specific evaluation activity. The conditions must be determined using available resources. In some cases specific materials will be developed for this purpose (i.e. a series of letters with typographical errors). Secondly, the specific task the student will perform for the evaluation must be identified (i.e. "Find and correct each error"). Finally, and most importantly, the specific standards of performance must be determined. In some cases the Performance Objective statement will provide all the information necessary to evaluate the performance. In many cases, however, it is necessary to develop a more detailed evaluation form or checklist. This checklist will include the criteria for evaluation and describe the minimum acceptable level of performance. Many of the identified resources can provide assistance in developing evaluation criteria.

STUDENT LEARNING EXPERIENCES

"Student Learning Experiences" are the enabling objectives which lead the student to successfully performing the task. Enabling objectives are the result of analyzing the components of a job task; the knowledge, skills and attitudes necessary for success. These steps assist the teacher in planning instruction, and assist students in understanding the nature of the task.

Student learning experiences are written as behavioral objectives, using action words (i.e. define, list, demonstrate, install, write, etc.), and listed in a logical sequence.

> Name the major parts of a machine lathe.
>
> Calculate the mean and standard deviation of marketing data.
>
> Describe the necessary safety precautions in installing brake shoes/pads.

Enabling objectives (Student Learning Experiences) describe the components of successful performance of the task, including the following:

KNOWLEDGE	concepts, facts or information which the student must know in order to properly perform the task.
ATTITUDES	worker attitudes which are necessary for acceptable performance of the task. Concepts such as responsibility, thoroughness, tactfulness, and others are often significant to successful job performance.
BASIC SKILLS	skills in communication and mathematics which are required for successful task performance. Specific math and communication skills which are embedded in the task should be identified.
SAFETY PRACTICES	policies and procedures which assure that the student performs the task in a safe manner.
SKILL DEVELOPMENT	practice of the job task or components of the task which build skill, speed and independence. Practice activities provide students with feedback on their level of proficiency.

Since Student Learning Experiences are stated as objectives (or outcomes), they help define specific instruction students should receive:

> If students have previously demonstrated proficiency in a particular experience, they are able to advance more quickly. The sequenced experiences also help identify prerequisites which aid the student in successfully mastering the task.
>
> Student Learning Experiences can be translated into evaluation activities to determine student proficiency.
>
> Student Learning Experiences can also be used to select or develop specific instructional materials. Teachers should identify the instructional techniques and/or resources which will meet the needs of the students and reach the desired outcomes.

SUGGESTED INSTRUCTIONAL TECHNIQUES

The previous two components of the curriculum guide (Performance Objective and Student Learning Experiences) provide the structure for instructional planning. Suggested Instructional Techniques provide some ideas regarding teaching activities. Teachers select instructional techniques that they feel are appropriate to their students, the facility, and the program. The suggestions provided in the curriculum guide can help teachers in developing interesting and effective instruction.

Competency based education can be delivered through a variety of instructional methodologies, including large group, small group, and individualized activities. In developing suggested instructional techniques, writers have attempted to provide ideas for these three modes.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES

It should be obvious that to teach certain skills, specific equipment and materials are required. By including this section in the curriculum guide, teachers can make certain that they have the capability of teaching the identified tasks. This section also provides guidance in planning instructional programs, by identifying the equipment and materials needed to teach specific job tasks.

RESOURCES

The resources section provides the "link" between the curriculum guide structure, and actual teaching materials. For most vocational programs a variety of student materials are available. These take the form of curriculum products from state/national curriculum centers and, textbooks, reference manuals, and industry training programs. Audio visual media and computer software also represent valid and appropriate resources for teaching many tasks.

The curriculum guide lists a variety of generally available resources which directly relate to the task. An annotated bibliography is provided at the end of the curriculum guide, to provide additional information on each resource.

SUMMARY

The key factor in the implementation of competency based education is, as always, the teacher. Although this curriculum guide can provide important guidelines on structure and many helpful suggestions, it is the teacher who implements the instruction. It is suggested that teachers use this guide as a working document. An effort has been made to provide adequate margins and space between selections for teacher notes. By "personalizing" this guide with activities, resources, and other information the value of the curriculum guide is greatly increased.

There are a variety of other resources available to assist teachers in improving their skill in planning and delivering competency based instruction. Teachers who desire assistance in this area are encouraged to contact the Arizona Department of Education or the Arizona Center for Vocational Education for assistance.

MARKETING EDUCATION COMPETENCIES AND TASKS
MASTER LISTING AND MATRIX
Arizona 1987

TASK#	COMPETENCY/TASK STATEMENT	GM	RE	ENT
01.00	MAKES CAREER DECISIONS	X	X	X
01.01	Reads trade journals & periodicals related to career int.	X	X	X
01.02	Analyzes career and occupational information	X	X	X
01.03	Compares business ownership with working for someone else	X	X	X
01.04	Assesses personal ability to be a successful entrepreneur	X	X	X
01.05	Identifies personal career goals and objectives	X	X	X
02.00	OBTAINS EMPLOYMENT	X	X	
02.01	Develops and uses a personal data sheet/resume	X	X	
02.02	Locates job openings for which applicant is qualified	X	X	
02.03	Develops neat, accurate and appropriate application letter	X	X	
02.04	Completes a neat and accurate job application form	X	X	
02.05	Arranges for a job interview and appears on time	X	X	
02.06	Researches company to determine possible interview question	X	X	
02.07	Presents an appopriate appearance for a job interview	X	X	
02.08	Demonstrates skill & confidence in job interview situation	X	X	
02.09	Follows up on employment contacts in writing or telephone	X	X	
03.00	COMMUNICATES WITH CUSTOMERS, CO-WORKERS AND SUPERVISORS	X	X	X
03.01	Utilizes correct vocabulary, grammar and spelling	X	X	X
03.02	Uses neat handwriting to prepare forms, messages & records	X	X	X
03.03	Reads and understands forms, reports, & computer printouts	X	X	X
03.04	Gathers data from books, manuals, directories or oth source	X	X	X
03.05	Composes business correspondence	X	X	X
03.06	Composes business reports	X	X	X
03.07	Develops business forms	X	X	X
03.08	Listens effectively to co-workers, supervisors customers	X	X	X
03.09	Asks appropriate questions to clarify another's commun.	X	X	X
03.10	Speaks clearly and distinctly with individuals & groups	X	X	X
03.11	Utilizes telephone in efficient and business-like manner	X	X	X
03.12	Reports status and progress to management	X	X	
03.13	Brings concerns and suggestions to supervisors & mgmt.	X	X	
04.00	PERFORMS PAYROLL CALCULATIONS	X	X	X
04.01	Calculates basic salary, overtime, commission, & quota	X	X	X
04.02	Calculates deductions appearing on a paycheck	X	X	X
05.00	USES TABLES AND CHARTS	X	X	X
05.01	Reads and interpret charts and graphs	X	X	X
05.02	Develops tables and charts	X	X	X
06.00	PROCESSES SALES TRANSACTIONS	X	X	
06.01	Calculates weights and measures	X	X	
06.02	Calculates discounts and sales tax	X	X	
06.03	Writes and computes sales checks and invoices	X	X	
06.04	Completes charge sales transactions	X	X	
06.05	Approves and accepts customer and client checks	X	X	
06.06	Process returns, refunds and exchanges	X	X	

07.00	OPERATES POINT-OF-SALE EQUIPMENT	X	X	
07.01	Makes change quickly and accurately	X	X	
07.02	Operates cash registers/terminals and related equipment	X	X	
07.03	Balances a cash drawer	X	X	
08.00	PERFORMS PRICING CALCULATIONS	X	X	X
08.01	Calculates trade, quantity and cash discounts	X	X	X
08.02	Calculates markup and selling price	X	X	X
08.03	Calculates markdown and selling price	X	X	X
09.00	DEMONSTRATES RESPONSIBLE WORK HABITS	X	X	X
09.01	Maintains a clean, neat and appropriate personal appearance	X	X	X
09.02	Demonstrates regular attendance and punctuality	X	X	X
09.03	Accomplishes tasks without need for immediate supervision	X	X	X
09.04	Demonstrates initiative	X	X	X
09.05	Adapts to changes in routine or unexpected situations	X	X	X
09.06	Checks or inspects results to ensure accuracy	X	X	X
10.00	USES EFFECTIVE INTERPERSONAL SKILLS	X	X	X
10.01	Works cooperatively with co-workers and supervisors	X	X	
10.02	Displays courtesy, tactfulness and patience	X	X	X
10.03	Controls emotions under demands time, pressure, opposition	X	X	X
10.04	Recognizes the accomplishments of others	X	X	X
11.00	DEMONSTRATES ETHICAL BEHAVIOR	X	X	X
11.01	Demonstrates honesty and intergrity	X	X	X
11.02	Maintains confidentiality of data or information	X	X	X
12.00	DEMONSTRATES PLANNING AND ORGANIZATIONAL SKILLS	X	X	X
12.01	Sets priorities and uses time to meet job requirements	X	X	X
12.02	Ensures that specific timelines are met	X	X	X
12.03	Plans and organizes the work of subordinates			X
13.00	DESCRIBES AMD APPLIES ECONOMIC PRINCIPLES	X	X	X
13.01	Describes how econ. resources are allocated in a free mkt.	X	X	X
13.02	Describes the basic concepts of the Free Enterprise System	X	X	X
13.03	Describes utility as it relates to production & marketing	X	X	X
13.04	Describes relationship of supply, demand, price & prod.	X	X	X
13.05	Describes the role of competition in marketing	X	X	X
13.06	Describes the nature of international trade	X	X	X
13.07	Describes components of profit & relationship to success	X	X	X
13.08	Describes how economic concepts influence mkt. decisions	X	X	X
14.00	DESCRIBES AND APPLIES BASIC MARKETING PRINCIPLES	X	X	X
14.01	Defines and describes the marketing functions	X	X	X
14.02	Defines and applies the term marketing concept	X	X	X
15.00	IDENTIFIES ENTREPRENEURIAL OPPORTUNITIES	X	X	X
15.01	Identifies major factors contributing to business success	X	X	X
15.02	Identifies the steps in finding a business to buy			X
15.03	Identifies legal issues to check before buying a business			X
15.04	Identifies franchise opportunities for a new business			X
15.05	Identifies the ingredients of a legal business contract			X

16.00	DEVELOPS A BUSINESS OPERATION PLAN			X
16.01	Selects an appropriate form of business ownership			X
16.02	Evaluates a business plan			X
16.03	Completes a business plan			X
16.04	Identifies professional assistance needed by entreprenuers			X
16.05	Describes government rules and regs affecting a business			X
17.00	MANAGES HUMAN RESOURCES	X	X	X
17.01	Describes the role of human resource management	X	X	X
17.02	Defines and describes the functions of management	X	X	X
17.03	Prepares an organization chart			X
17.04	Uses an effective style of leadership	X	X	X
17.05	Orients new employees	X	X	X
17.06	Prepares a job analysis and job description			X
18.00	ANALYZES THE MARKET FOR A PRODUCT/SERVICE	X	X	X
18.01	Identifies sources of information for segmenting a market	X	X	X
18.02	Identify the target market(s) for products and/or services	X	X	X
18.03	Develop a business idea from a hobby or special interest			X
18.04	Develops a marketing plan for a product or service	X	X	X
19.00	EXPLAINS PRODUCT/SERVICE CHARACTERISTICS	X	X	
19.01	Explains proper use and care of products	X	X	
19.02	Explains applicable grades and standards	X	X	
19.03	Explains warranties and guarantees	X	X	
19.04	Explains consumer protection provisions of appro. agencies	X	X	
20.00	DETERMINES THE STORE/BUSINESS FACILITY			X
20.01	Identifies types of zoning restrictions			X
20.02	Selects an appropriate business location			X
20.03	Develops an appropriate store/facility design and layout			X
21.00	PROCESSES INVENTORY AND INVENTORY RECORDS	X	X	X
21.01	Checks incoming stock and completes receiving reports		X	X
21.02	Price marks merchandise		X	
21.03	Makes and records price changes		X	
21.04	Finds pricing errors and corrects them		X	
21.05	Maintains stock control records	X	X	X
21.06	Transfers stock to storage or sales point		X	
21.07	Processes returns to vendors		X	X
21.08	Selects transportation to ship and receive merchandise	X	X	X
22.00	PURCHASES MERCHANDISE FOR RESALE	X	X	X
22.01	Advises the buyer of customer requests or reactions		X	
22.02	Comparison shops competitors	X	X	X
22.03	Completes stock counts	X	X	X
22.04	Places routine orders	X	X	X
22.05	Completes purchase orders	X	X	X
22.06	Develops a system of retail buying and merchandising			X
22.07	Identifies and selects vendors			X
23.00	ESTABLISHES THE SELLING PRICE FOR PRODUCTS/SERVICES	X	X	X
23.01	Develops a pricing strategy for a product or service			X
23.02	Computes break-even points	X	X	X
23.03	Determines the selling price	X	X	X

24.00	SELLS PRODUCTS AND/OR SERVICES	X	X	
24.01	Determines and uses customer needs and buying motives	X	X	
24.02	Uses an appropriate greeting and opening statement	X	X	
24.03	Uses product/service information obtained with the item	X	X	
24.04	Properly handles and demonstrates the product/service	X	X	
24.05	Emphasizes customer benefits in presenting product features	X	X	
24.06	Involves the customer in the sales presentation	X	X	
24.07	Listens to and answers customer objections/complaints	X	X	
24.08	Closes the sale	X	X	
24.09	Uses suggestion selling	X	X	
25.00	PERFORMS SALES SUPPORTING ACTIVITIES	X	X	X
25.01	Determines the role of selling in the business			X
25.02	Maintains and uses a customer/client list	X	X	X
25.03	Handles customer inquiries	X	X	X
25.04	Processes mail, telephone, and special orders	X	X	
25.05	Wraps, bags, or package products		X	
25.06	Arranges alterations, delivery, or installation		X	
26.00	PLANS AND CONSTRUCTS MERCHANDISE DISPLAYS	X	X	
26.01	Plans and schedules merchandise displays		X	
26.02	Designs merchandise displays	X	X	
26.03	Assembles, maintains and dismantles displays		X	
26.04	Makes and uses price cards and signs		X	
27.00	DEVELOPS PROMOTIONAL PLANS	X	X	X
27.01	Develops a promotional mix for a business or organization	X	X	X
27.02	Develops an advertising campaign for a small business			X
28.00	APPLIES RESEARCH TECHNIQUES TO MARKETING DECISIONS	X	X	X
28.01	Uses problem solving strategies to make decisions	X	X	X
28.02	Develops a market research plan for a product or service	X		X
29.00	USES COMPUTERS TO AID MANAGEMENT AND DECISION MAKING	X	X	X
29.01	Operates a microcomputer or computer terminal	X	X	X
29.02	Uses computer data base systems to store/retrieve infor.	X	X	X
29.03	Uses computer spreadsheet software to analyze information	X	X	X
29.04	Uses computer hardware/software for electronic commun.	X	X	X
29.05	Identifies steps to take in obtaining a computer system			X
30.00	PERFORMS ACCOUNTING FUNCTIONS	X		X
30.01	Maintains accounting records for a small business			X
30.02	Prepares an income statement	X		X
30.03	Prepares a balance sheet	X		X
30.04	Selects an accounting system for a small business			X
31.00	IMPLEMENTS CREDIT PROCEDURES	X	X	X
31.01	Interprets and explains credit policies	X	X	X
31.02	Establishes credit policies for a small business			X
32.00	UTILIZES EFFECTIVE FINANCIAL MANAGEMENT			X
32.01	Lists the types of costs involved starting a new business			X
32.02	Calculates financial ratios			X
32.03	Interprets financial statements			X
32.04	Develops and implements a financial management plan			X

33.00	MINIMIZES BUSINESS RISK AND LOSSES	X	X	X
33.01	Follows safe work practices	X	X	X
33.02	Identifies the types of insurance needed by a business			X
33.03	Develops a plan for protection against business crime			X
33.04	Uses procedures to reduce shrinkage, waste, shoplift,theft	X	X	X

MARKETING EDUCATION COMPETENCIES AND TASKS FOR: GENERAL MARKETING
Arizona--Revised 1987

01.00 MAKES CAREER DECISIONS
01.01 Reads trade journals & periodicals related to career int.
01.02 Analyzes career and occupational information
01.03 Compares business ownership with working for someone else
01.04 Assesses personal ability to be successful entrepreneur
01.05 Identifies personal career goals and objectives

02.00 OBTAINS EMPLOYMENT
02.01 Develops and uses a personal data sheet/resume
02.02 Locates job openings for which applicant is qualified
02.03 Develops neat, accurate and appropriate application letter
02.04 Completes a neat and accurate job application form
02.05 Arranges for a job interview and appears on time
02.06 Researches company to determine possible interview question
02.07 Presents an appropriate appearance for a job interview
02.08 Demonstrates skill & confidence in job interview situation
02.09 Follows up on employment contacts in writing or telephone

03.00 COMMUNICATES WITH CUSTOMERS, CO-WORKERS AND SUPERVISORS
03.01 Utilizes correct vocabulary, grammar and spelling
03.02 Uses neat handwriting to prepare forms, messages & records
03.03 Reads and understands forms, reports, & computer printouts
03.04 Gathers data from books, manuals, directories or other source
03.05 Composes business correspondence
03.06 Composes business reports
03.07 Develops business forms
03.08 Listens effectively to co-workers, supervisors customers
03.09 Asks appropriate questions to clarify another's commun.
03.10 Speaks clearly and distinctly with individuals & groups
03.11 Utilizes telephone in efficient and business-like manner
03.12 Reports status and progress to management
03.13 Brings concerns and suggestions to supervisors & mgmt.

04.00 PERFORMS PAYROLL CALCULATIONS
04.01 Calculates basic salary, overtime, commission, & quota
04.02 Calculates deductions appearing on a paycheck

05.00 USES TABLES AND CHARTS
05.01 Reads and interpret charts and graphs
05.02 Develops tables and charts

06.00 PROCESSES SALES TRANSACTIONS
06.01 Calculates weights and measures
06.02 Calculates discounts and sales tax
06.03 Writes and computes sales checks and invoices
06.04 Completes charge sales transactions
06.05 Approves and accepts customer and client checks
06.06 Process returns, refunds and exchanges

07.00 OPERATES POINT-OF-SALE EQUIPMENT
07.01 Makes change quickly and accurately
07.02 Operates cash registers/terminals and related equipment
07.03 Balances a cash drawer

08.00 PERFORMS PRICING CALCULATIONS
08.01 Calculates trade, quantity and cash discounts
08.02 Calculates markup and selling price
08.03 Calculates markdown and selling price

09.00 DEMONSTRATES RESPONSIBLE WORK HABITS
09.01 Maintains a clean, neat and appropriate personal appearance
09.02 Demonstrates regular attendance and punctuality
09.03 Accomplishes tasks without need for immediate supervision
09.04 Demonstrates initiative
09.05 Adapts to changes in routine or unexpected situations
09.06 Checks or inspects results to ensure accuracy

10.00 USES EFFECTIVE INTERPERSONAL SKILLS
10.01 Works cooperatively with co-workers and supervisors
10.02 Displays courtesy, tactfulness and patience
10.03 Controls emotions under demands time, pressure, opposition
10.04 Recognizes the accomplishments of others

11.00 DEMONSTRATES ETHICAL BEHAVIOR
11.01 Demonstrates honesty and integrity
11.02 Maintains confidentiality of data or information

12.00 DEMONSTRATES PLANNING AND ORGANIZATIONAL SKILLS
12.01 Sets priorities and uses time to meet job requirements
12.02 Ensures that specific timelines are met

13.00 DESCRIBES AND APPLIES ECONOMIC PRINCIPLES
13.01 Describes how econ. resources are allocated in a free mkt.
13.02 Describes the basic concepts of the Free Enterprise System
13.03 Describes utility as it relates to production & marketing
13.04 Describes relationship of supply, demand, price & prod.
13.05 Describes the role of competition in marketing
13.06 Describes the nature of international trade
13.07 Describes components of profit & relationship to success
13.08 Describes how economic concepts influence mkt. decisions

14.00 DESCRIBES AND APPLIES BASIC MARKETING PRINCIPLES
14.01 Defines and describes the marketing functions
14.02 Defines and applies the term marketing concept

15.00 IDENTIFIES ENTREPRENEURIAL OPPORTUNITIES
15.01 Identifies major factors contributing to business success

17.00 MANAGES HUMAN RESOURCES
17.01 Describes the role of human resource management
17.02 Defines and describes the functions of management
17.04 Uses an effective style of leadership
17.05 Orients new employees

18.00 ANALYZES THE MARKET FOR A PRODUCT/SERVICE
18.01 Identifies sources of information for segmenting a market
18.02 Identify the target market(s) for products and/or services
18.04 Develops a marketing plan for a product or service

19.00 EXPLAINS PRODUCT/SERVICE CHARACTERISTICS
19.01 Explains proper use and care of products
19.02 Explains applicable grades and standards
19.03 Explains warranties and guarantees
19.04 Explains consumer protection provisions of appro. agencies

21.00 PROCESSES INVENTORY AND INVENTORY RECORDS
21.05 Maintains stock control records
21.08 Selects transportation to ship and receive merchandise

22.00 PURCHASES MERCHANDISE FOR RESALE
22.02 Comparison shops competitors
22.03 Completes stock counts
22.04 Places routine orders
22.05 Completes purchase orders

23.00 ESTABLISHES THE SELLING PRICE FOR PRODUCTS/SERVICES
23.02 Computes break-even points
23.03 Determines the selling price

24.00 SELLS PRODUCTS AND/OR SERVICE
24.01 Determines and uses customer needs and buying motives
24.02 Uses an appropriate greeting and opening statement
24.03 Uses product/service information obtained with the item
24.04 Properly handles and demonstrates the product/service
24.05 Emphasizes customer benefits in presenting product features
24.06 Involves the customer in the sales presentation
24.07 Listens to and answers customer objections/complaints
24.08 Closes the sale
24.09 Uses suggestion selling

25.00 PERFORMS SALES SUPPORTING ACTIVITIES
25.02 Maintains and uses a customer/client list
25.03 Handles customer inquiries
25.04 Processes mail, telephone, and special orders

26.00 PLANS AND CONSTRUCTS MERCHANDISE DISPLAYS
26.02 Designs merchandise displays

27.00 DEVELOPS PROMOTIONAL PLANS
27.01 Develops a promotional mix for a business or organization

28.00 APPLIES RESEARCH TECHNIQUES TO MARKETING DECISIONS
28.01 Uses problem solving strategies to make decisions
28.02 Develops a market research plan for a product or service

29.00 USES COMPUTERS TO AID MANAGEMENT AND DECISION MAKING
29.01 Operates a microcomputer or computer terminal
29.02 Uses computer data base systems to store/retrieve information
29.03 Uses computer spreadsheet software to analyze information
29.04 Uses computer hardware/software for electronic commun.

30.00 PERFORMS ACCOUNTING FUNCTIONS
30.02 Prepares an income statement
30.03 Prepares a balance sheet

31.00 IMPLEMENTS CREDIT PROCEDURES
31.01 Interprets and explains credit policies

33.00 MINIMIZES BUSINESS RISK AND LOSSES
33.01 Follows safe work practices
33.04 Uses procedures to reduce shrinkage, waste, shoplift, theft

MARKETING EDUCATION COMPETENCIES AND TASKS FOR: RETAILING
Arizona--Revised 1987

01.00 MAKES CAREER DECISIONS
01.01 Reads trade journals & periodicals related to career int.
01.02 Analyzes career and occupational information
01.03 Compares business ownership with working for someone else
01.04 Assesses personal ability to be a successful entrepreneur
01.05 Identifies personal career goals and objectives

02.00 OBTAINS EMPLOYMENT
02.01 Develops and uses a personal data sheet/resume
02.02 Locates job openings for which applicant is qualified
02.03 Develops neat, accurate and appropriate application letter
02.04 Completes a neat and accurate job application form
02.05 Arranges for a job interview and appears on time
02.06 Researches company to determine possible interview question
02.07 Presents an appropriate appearance for a job interview
02.08 Demonstrates skill & confidence in job interview situation
02.09 Follows up on employment contacts in writing or telephone

03.00 COMMUNICATES WITH CUSTOMERS, CO-WORKERS AND SUPERVISORS
03.01 Utilizes correct vocabulary, grammar and spelling.
03.02 Uses neat handwriting to prepare forms, messages & records
03.03 Reads and understands forms, reports, & computer printouts
03.04 Gathers data from books, manuals, directories or other source
03.05 Composes business correspondence
03.06 Composes business reports
03.07 Develops business forms
03.08 Listens effectively to co-workers, supervisors, customers
03.09 Asks appropriate questions to clarify another's commun.
03.10 Speaks clearly and distinctly with individuals & groups
03.11 Utilizes telephone in efficient and business-like manner
03.12 Reports status and progress to management
03.13 Brings concerns and suggestions to supervisors & mgmt.

04.00 PERFORMS PAYROLL CALCULATIONS
04.01 Calculates basic salary, overtime, commission, & quota
04.02 Calculates deductions appearing on a paycheck

05.00 USES TABLES AND CHARTS
05.01 Reads and interpret charts and graphs
05.02 Develops tables and charts

06.00 PROCESSES SALES TRANSACTIONS
06.01 Calculates weights and measures
06.02 Calculates discounts and sales tax
06.03 Writes and computes sales checks and invoices
06.04 Completes charge sales transactions
06.05 Approves and accepts customer and client checks
06.06 Process returns, refunds and exchanges

07.00 OPERATES POINT-OF-SALE EQUIPMENT
07.01 Makes change quickly and accurately
07.02 Operates cash registers/terminals and relates equipment
07.03 Balances a cash drawer

08.00 PERFORMS PRICING CALCULATIONS
08.01 Calculates trade, quantity and cash discounts
08.02 Calculates markup and selling price
08.03 Calculates markdown and selling price

09.00 DEMONSTRATES RESPONSIBLE WORK HABITS
09.01 Maintains a clean, neat and appropriate personal appearance
09.02 Demonstrates regular attendance and punctuality
09.03 Accomplishes tasks without need for immediate supervision
09.04 Demonstrates initiative
09.05 Adapts to changes in routine or unexpected situations
09.06 Checks or inspects results to ensure accuracy

10.00 USES EFFECTIVE INTERPERSONAL SKILLS
10.01 Works cooperatively with co-workers and supervisors
10.02 Displays courtesy, tactfulness and patience
10.03 Controls emotions under pressure, opposition
10.04 Recognizes the accomplishments of others

11.00 DEMONSTRATES ETHICAL BEHAVIOR
11.01 Demonstrates honesty and integrity
11.02 Maintains confidentiality of data or information

12.00 DEMONSTRATES PLANNING AND ORGANIZATIONAL SKILLS
12.01 Sets priorities and uses time to meet job requirements
12.02 Ensures that specific timelines are met

13.00 DESCRIBES AND APPLIES ECONOMIC PRINCIPLES
13.01 Describes how econ. resources are allocated in a free mkt.
13.02 Describes the basic concepts of the Free Enterprise System
13.03 Describes utility as it relates to production & marketing
13.04 Describes relationship of supply, demand, price & prod.
13.05 Describes the role of competition in marketing
13.06 Describes the nature of international trade
13.07 Describes components of profit & relationship to success
13.08 Describes how economic concepts influence mkt. decisions

14.00 DESCRIBES AND APPLIES BASIC MARKETING PRINCIPLES
14.01 Defines and describes the marketing functions
14.02 Defines and applies the term marketing concept

15.00 IDENTIFIES ENTREPRENEURIAL OPPORTUNITIES
15.01 Identifies major factors contributing to business success

17.00 MANAGES HUMAN RESOURCES
17.01 Describes the role of human resources management
17.02 Defines and describes the functions of management
17.04 Uses an effective style of leadership
17.05 Orients new employees

18.00 ANALYZES THE MARKET FOR A PRODUCT/SERVICE
18.01 Identifies sources of information for segmenting a market
18.02 Identify the target market(s) for products and/or services
18.04 Develops a marketing plan for a product or service

19.00 EXPLAINS PRODUCT/SERVICE CHARACTERISTICS
19.01 Explains proper use and care of products
19.02 Explains applicable grades and standards
19.03 Explains warranties and guarantees
19.04 Explains consumer protection provisions of appro. agencies

21.00 PROCESSES INVENTORY AND INVENTORY RECORDS
21.01 Checks incoming stock and completes receiving reports
21.02 Price marks merchandise
21.03 Makes and records price changes
21.04 Finds pricing errors and corrects them
21.05 Maintains stock control records
21.06 Transfers stock to storage or sales point
21.07 Processes returns to vendors
21.08 Selects transportation to ship and receive merchandise

22.00 PURCHASES MERCHANDISE FOR RESALE
22.01 Advises the buyer of customer requests or reactions
22.02 Comparison shops competitors
22.03 Completes stock counts
22.04 Places routine orders
22.05 Completes purchase orders

23.00 ESTABLISHES THE SELLING PRICE FOR PRODUCTS/SERVICES
23.02 Computes break-even points
23.03 Determines the selling price

24.00 SELLS PRODUCTS AND/OR SERVICES
24.01 Determines and uses customer needs and buying motives
24.02 Uses an appropriate greeting and opening statement
24.03 Uses product/service information obtained with the item
24.04 Properly handles and demonstrates the product/service
24.05 Emphasizes customer benefits in presenting product features
24.06 Involves the customer in the sales presentation
24.07 Listens to and answers customer objections/complaints
24.08 Closes the sale
24.09 Uses suggestion selling

25.00 PERFORMS SALES SUPPORTING ACTIVITIES
25.02 Maintains and uses a customer/client list
25.03 Handles customer inquiries
25.04 Processes mail, telephone, and special orders
25.06 Arranges alterations, delivery, or installation

26.00 PLANS AND CONSTRUCTS MERCHANDISE DISPLAYS
26.01 Plans and schedules merchandise displays
26.02 Designs merchandise displays
26.03 Assembles, maintains and dismantles displays
26.04 Makes and uses price cards and signs

27.00 DEVELOPS PROMOTIONAL PLANS
27.01 Develops a promotional mix for a business or organization

28.00 APPLIES RESEARCH TECHNIQUES TO MARKETING DECISIONS
28.01 Uses problem solving strategies to make decisions

29.00 USES COMPUTERS TO AID MANAGEMENT AND DECISION MAKING
29.01 Operates a microcomputer or computer terminal
29.02 Uses computer data base systems to store/retrieve infor.
29.03 Uses computer spreadsheet software to analyze information
29.04 Uses computer hardware/software for electronic commun.

31.00 IMPLEMENTS CREDIT PROCEDURES
31.01 Interprets and explains credit policies

33.00 MINIMIZES BUSINESS RISK AND LOSSES
33.01 Follows safe work practices
33.04 Uses procedures to reduce shrinkage, waste, shoplift, theft

MARKETING EDUCATION COMPETENCIES AND TASKS FOR: ENTREPRENEURSHIP
Arizona--Revised 1987

01.00 MAKES CAREER DECISIONS
01.01 Reads trade journals & periodicals related to career int.
01.02 Analyzes career and occupational information
01.03 Compares business ownership with working for someone else
01.04 Assesses personal ability to e a successful entrepreneur
01.05 Identifies personal career goals and objectives

03.00 COMMUNICATES WITH CUSTOMERS, CO-WORKERS AND SUPERVISORS
03.01 Utilizes correct vocabulary, grammar and spelling
03.02 Uses neat handwriting to prepare forms, messages & records
03.03 Reads and understands forms, reports, & computer printouts
03.04 Gathers data from books, manuals, directories or other sources
03.05 Composes business correspondence
03.06 Composes business reports
03.07 Develops business forms
03.08 Listens effectively to co-workers, supervisors customers
03.09 Asks appropriate questions to clarify another's commun.
03.10 Speaks clearly and distinctly with individuals & groups
03.11 Utilizes telephone in efficient and business-like manner

04.00 PERFORMS PAYROLL CALCULATIONS
04.01 Calculates basic salary, overtime, commission, & quota
04.02 Calculates deductions appearing on a paycheck

05.00 USES TABLES AND CHARTS
05.01 Reads and interpret charts and graphs
05.02 Develops tables and charts

08.00 PERFORMS PRICING CALCULATIONS
08.01 Calculates trade, quantity and cash discounts
08.02 Calculates markup and selling price
08.03 Calculates markdown and selling price

09.00 DEMONSTRATES RESPONSIBLE WORK HABITS
09.01 Maintains a clean, neat and appropriate personal appearance
09.02 Demonstrates regular attendance and punctuality
09.03 Accomplishes tasks without need for immediate supervision
09.04 Demonstrates initiative
09.05 Adapts to changes in routine or unexpected situations
09.06 Checks or inspects results to ensure accuracy

10.00 USES EFFECTIVE INTERPERSONAL SKILLS
10.02 Displays courtesy, tactfulness and patience
10.03 Controls emotions under demands time, pressure, opposition
10.04 Recognizes the accomplishments of others

11.00 DEMONSTRATES ETHICAL BEHAVIOR
11.01 Demonstrates honesty and integrity
11.02 Maintains confidentiality of data or information

12.00 DEMONSTRATES PLANNING AND ORGANIZATIONAL SKILLS
12.01 Sets priorities and use time to meet job requirements
12.02 Ensures that specific timelines are met
12.03 Plans and organizes the work of subordinates

13.00 DESCRIBES AND APPLIES ECONOMIC PRINCIPLES
13.01 Describes how econ. resources are allocated in a free mkt.
13.02 Describes the basic concepts of the Free Enterprise System
13.03 Describes utility as it relates to production & marketing
13.04 Describes relationship of supply, demand, price & prod.
13.05 Describes the role of competition in marketing
13.06 Describes the nature of international trade
13.07 Describes components of profit & relationship to success
13.08 Describes how economic concepts influence mkt. decisions

14.00 DESCRIBES AND APPLIES BASIC MARKETING PRINCIPLES
14.01 Defines and describes the marketing functions
14.02 Defines and applies the term marketing concept

15.00 IDENTIFIES ENTREPRENEURIAL OPPORTUNITIES
15.01 Identifies major factors contributing to business success
15.02 Identifies the steps in finding a business to buy
15.03 Identifies legal issues to check before buying a business
15.04 Identifies franchise opportunities for a new business
15.05 Identifies the ingredients of a legal business contract

16.00 DEVELOPS A BUSINESS OPERATION PLAN
16.01 Selects an appropriate form of business ownership
16.02 Evaluates a business plan
16.03 Completes a business plan
16.04 Identifies professional assistance needed by entrepreneurs
16.05 Describes government rules and regulations affecting a business

17.00 MANAGES HUMAN RESOURCES
17.01 Describes the role of human resource management
17.02 Defines and describes the functions of management
17.03 Prepares an organization chart
17.04 Uses an effective style of leadership
17.05 Orients new employees
17.06 Prepares a job analysis and job description

18.00 ANALYZES THE MARKET FOR A PRODUCT/SERVICE
18.01 Identifies sources of information for segmenting a market
18.02 Identify the target market(s) for products and/or service
18.03 Develop a business idea from a hobby or special interest
18.04 Develops a marketing plan for a product or service

20.00 DETERMINES THE STORE/BUSINESS FACILITY
20.01 Identifies types of zoning restrictions
20.02 Selects an appropriate business location
20.03 Develops an appropriate store/facility design and layout

21.00 PROCESSES INVENTORY AND INVENTORY RECORDS
21.01 Checks incoming stock and completes receiving reports
21.05 Maintains stock control records
21.07 Processes returns to vendors
21.08 Selects transportation to ship and receive merchandise

22.00 PURCHASES MERCHANDISE FOR RESALE
22.02 Comparison shops competitors
22.03 Completes stock counts
22.04 Places routine orders
22.05 Completes purchase orders
22.06 Develops a system of retail buying and merchandising
22.07 Identifies and selects vendors

23.00 ESTABLISHES THE SELLING PRICE FOR PRODUCTS/SERVICES
23.01 Develops a pricing strategy for a product or service
23.02 Computes break-even points
23.03 Determines the selling price

25.00 PERFORMS SALES SUPPORTING ACTIVITIES
25.01 Determines the role of selling in the business
25.02 Maintains and uses a customer/client list
25.03 Handles customer inquiries

27.00 DEVELOPS PROMOTIONAL PLANS
27.01 Develops a promotional mix for a business or organization
27.02 Develops an advertising campaign for a small business

28.00 APPLIES RESEARCH TECHNIQUES TO MARKETING DECISIONS
28.01 Uses problem solving strategies to make decisions
28.02 Develops a market research plan for a product or service

29.00 USES COMPUTERS TO AID MANAGEMENT AND DECISION MAKING
29.01 Operates a microcomputer or computer terminal
29.02 Uses computer data base systems to store/retrieve infor.
29.03 Uses computer spreadsheet software to analyze information
29.04 Uses computer hardware/software for electronic commun.
29.05 Identifies steps to take in obtaining a computer system

30.00 PERFORMS ACCOUNTING FUNCTIONS
30.01 Maintains accounting records for a small business
30.02 Prepares an income statement
30.03 Prepares a balance sheet
30.04 Selects an accounting system for a small business

31.00 IMPLEMENTS CREDIT PROCEDURES
31.01 Interprets and explains credit policies
31.02 Establishes credit policies for a small business

32.00 UTILIZES EFFECTIVE FINANCIAL MANAGEMENT
32.01 Lists the types of costs involved starting a new business
32.02 Calculates financial ratios
32.03 Interprets financial statements
32.04 Develops and implements a financial management plan

33.00 MINIMIZES BUSINESS RISK AND LOSSES
33.01 Follows safe work practices
33.02 Identifies the types of insurance needed by a business
33.03 Develops a plan for protection against business crime
33.04 Uses procedures to reduce shrinkage, waste, shoplift, theft

EMPLOYABILITY

1.0 **COMPETENCY:** Makes career decisions.

1.1 **TASK:** Reads trade journals and periodicals related to career interests.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a periodical related to student's career interest,

EVALUATION Reads and summarizes an appropriate article.

STANDARD: The summary should accurately describe the article, use correct industry terminology, and be applicable to the student's interest and experience.

STUDENT LEARNING EXPERIENCES:

1. Define and describe trade journals.
2. Describe the benefits of reading trade journals and periodicals.
3. List trade journals and periodicals in a given industry.
4. Find trade journals/periodicals in a library.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Select appropriate trade journal articles for all students to read. Discuss the article in class.

2. In small groups have students share what they have learned from an article. Have a group leader report the findings to the rest of the class.

3. Have each student complete an article review and write a written report summarizing the article. This could be done on a regularly scheduled basis (i.e. one per month).

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

1. Samples of various trade journals and periodicals, which could be obtained from a library for from local businesses.

RESOURCES:

ADVERTISING AGE. 740 Rush Street, Chicago, IL 60611.

BUSINESS WEEK. McGraw-Hill, Inc., 1221 Avenue of the Americas, New York, NY 10020.

CHAIN STORE AGE GEN. MDSE. EDITION. Lebhar-Friedman, Inc. Subscription Dept. 99 Park Avenue, New York, NY 10016.

FORBES. 60 Fifth Ave., New York, NY 10011.

HARVARD BUSINESS REVIEW. Harvard Business School, Soldiers Field, Boston, MA 02163.

INC. MAGAZINE. 38 Commercial Wharf, Boston, MA 02110.

JOURNAL OF MARKETING. 222 Riverside Plaza, Room 606, Chicago, IL 60606.

JOURNAL OF RETAILING. New York University, Institute of Retail Management, 202 Tisch Hall, Washington Square, New York, NY 10003.

SALES AND MARKETING MANAGEMENT. Bill Communications, 53 Park Pl., New York, NY 10013.

STORES MAGAZINE. National Retail Merchants Association, 100 W. 31st St. New York, NY 10001.

VENTURE: THE MAGAZINE FOR ENTREPRENEURS. 35 W. 45th St., New York, NY 10036.

1.0 **COMPETENCY:** Makes career decisions.

1.2 **TASK:** Analyzes career and occupational information.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a career topic of interest and access to career information,

EVALUATION: analyzes career and occupational information.

STANDARD: A report submitted will list the jobs available in the career cluster and the educational and training requirements for each job.

STUDENT LEARNING EXPERIENCES:

1. Identify the locally available sources of career and occupational information.
2. Describe the types of career information that can be helpful in making a career choice.
3. Complete a job description for a selected occupation.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. As a class select various careers. Using the DICTIONARY OF OCCUPATIONAL TITLES and other resources, discuss job characteristics, employment potential, and educational and training requirements.
2. In small groups have students with similar career interests research and report on career opportunities.
3. Have each student obtain specific career information from a computer based system, such as G. I. S. Have students give oral reports on their findings.
4. Invite various guest speakers throughout the year to speak on specific career opportunities.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

1. Access to GIS or similar computer information system.

RESOURCES:

Hopke, William E., ENCYCLOPEDIA OF CAREER AND VOCATIONAL GUIDANCE, J. G. Ferguson Publishing Company. Chicago, IL.

Mason, Ralph, Patricia Rath, Stewart Husted, and Richard Lynch, MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 29-30. 1986.

Meyer, Warren, Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, Seventh Edition, McGraw-Hill Book Company. New York, NY. pp. 3, 7-8. 1982.

Stull, William A. and Zedlitz, Robert H. COOPERATIVE WORK EXPERIENCE MANUAL. South-Western Publishing Company, Cincinnati, OH. pp. 229-236. 1984.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company. New York, NY. pp. 121-175. 1980.

DICTIONARY OF OCCUPATIONAL TITLES, U. S. Department of Labor, Washington, DC. 1986-87.

OCCUPATIONAL OUTLOOK HANDBOOK, U. S. Department of Labor, Washington, DC. 1986-87.

1.0 **COMPETENCY:** Makes career decisions.

1.3 **TASK:** Compares business ownership with working for someone else.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific career area,

EVALUATION: compares the advantage of owning a business with the advantages of working with/for someone else.

STANDARD: Description contains at least five advantages of working for someone else and five advantages of owning a business in the defined career area.

STUDENT LEARNING EXPERIENCE:

1. Define and describe "entrepreneurship".
2. List the advantages and disadvantages of owning a business.
3. List the advantages and disadvantages of working with/for someone else.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Lead a classroom discussion on the advantages of owning a business. Compare these advantages with those of working for someone else.
2. Have an entrepreneur come into class and speak on the advantages of owning a business. Compare these advantages with the advantages of working for someone else.
3. In small groups, have students develop a panel. One group will discuss the advantage of owing a business, the other group will discuss the advantage of working for others.
4. Have each individual student list the advantages of owning a business and the advantage of working for others.

INSTRUCTIONAL EQUIPMENT, MATERIAL AND SUPPLIES:

RESOURCES:

Rowe, Kenneth L. and Roger W. Hutt. PREPARING FOR ENTREPRENEURSHIP (INSTRUCTIONAL GUIDE), Arizona Department of Education, Phoenix, AZ. pp. 1-20. 1979.

PACE - DETERMINING YOUR POTENTIAL AS AN ENTREPRENEUR. Unit 2, Levels 1 and 2.

1.0 **COMPETENCY:** Makes career decisions.

1.4 **TASK:** Assesses personal ability to be a successful entrepreneur.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a self-assessment instrument,

EVALUATION: assesses personal ability to be a successful entrepreneur.

STANDARD: The assessment instrument will be completed in a manner consistent with the directions provided, and a one-page summary analyzing the results of the instrument will accurately interpret the analysis.

STUDENT LEARNING EXPERIENCES:

1. List characteristics of an entrepreneur.
2. List and describe the reasons people become entrepreneurs.
3. Match characteristics of an entrepreneur with individual charactistics.

SUGGESTED INSTRUCTIONAL TECNNIQUES:

1. Have students discuss the characteristics of an entrepreneur. List characteristics on the chalk board. Have students identify themselves with the characteristics.
2. In small groups have students brainstorm what makes a successful entrepreneur. Have a spokesperson share with the class what their groups discussed.
3. Have each student write two paragraphs explainging why they would make a successful entrepreneur.

INSTRUCTIONAL EQUIPMENT, MATERIAL, AND SUPPLIES:

RESOURCES:

Hailes, William D., Raymond T. Hubbard. SMALL BUSINESS MANAGEMENT Delmar Publishing Company. Albany, NY. pp.1-21

Rowe, Kenneth L. and Roger W. Hutt. PREPARING FOR ENTREPRENEURSHIP (INSTRUCTIONAL GUIDE). Arizona Department of Education, Phoenix, AZ. pp. 1-20. 1979.

PACE - DETERMINING YOUR POTENTIAL AS AN ENTREPRENEUR. Unit 2, Level 1 and 2.

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1.0 **COMPETENCY:** Makes career decisions.

1.5 **TASK:** Identifies personal career goals and objectives.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a self assessment instrument and career information,

EVALUATION: identifies personal career goals and objectives.

STANDARD: Written list of career goals and objectives evidences career interests, aptitudes, and occupational characteristics.

STUDENT LEARNING EXPERIENCES:

1. Describe the value of having written personal career goals and objectives.
2. Develop a personal profile listing aptitudes and interests.
3. Develop a profile of the characteristics of careers which match personal aptitudes and interests.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have the class brainstorm on the different jobs in the working world. Categorize these jobs in the following area: outdoors, financial, management, instructing, sciences, sales, social artistic, and research. Discuss the training and education needed for these jobs.

2. Discuss as a class the importance of goal setting and career planning.

3. Have students work in small groups with students of similar interest. In their small groups they can discuss why they are interested in a particular job, how they will proceed in getting that job, and their long-term goals.

4. Have each student list their strengths weaknesses, needs, and wants. Have the students complete the skills inventory exercise and match their career goals with their strengths, weaknesses, needs and wants.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

1. Skill inventory exercise.

RESOURCES:

Bikkie, James A. CAREERS IN MARKETING. McGraw-Hill Book Company. New York, NY. pp. 1-14. 1978.

Bolles, Richard N., WHAT COLOR IS YOUR PARACHUTE Ten Speed Press, Berkley, CA. pp. 73, 199-222. 1982.

Daggett, Willard R., THE DYNAMICS OF WORK South-Western Publishing Company. Cincinnati, OH. pp. 28-51. 1984.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company. New York, NY. pp. 55-175. 1980.

Stull, William A. and Zedlitz, Robert H. COOPERATIVE WORK EXPERIENCE MANUAL. South-Western Publishing Company. Cincinnati, OH. pp. 237-239. 1984.

2.0 **COMPETENCY:** Obtains employment.

2.1 **TASK:** Develops and uses a personal data sheet/resume.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given example formats for a data sheet/resume,

EVALUATION: develops and uses a personal data sheet/resume.

STANDARD: The resume will be typed without error and follow one of the provided formats.

STUDENT LEARNING EXPERIENCES:

1. Explain the purposes of a personal data sheet/resume.
2. Describe various ways the resume may be used.
3. Explain why a resume should be neat, complete and accurate.
4. List the data a resume should contain, and formats which are commonly used for various employment situations.
5. Evaluate sample resumes and make suggestions for improvement.
6. Develop a rough draft of a resume.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have the class evaluate various resumes. With given information have the class develop a resume.
2. In small groups of four to five students, have each group develop different styles of resumes. Then have them select the style they would use.
3. Have each student develop and use a resume which contains the five basic sections.

INSTRUCTIONAL EQUIPMENT, MATERIAL, AND SUPPLIES:

1. Typewriter, word processor or typing service.
2. Sample of resumes.

RESOURCES:

Huseman, Richard C., James M. Lahiff John D. Halfield. BUSINESS COMMUNICATION, Stategies and Skills, Holt, Rinehart, Winston Publishers, New York, NY. pp. 341-59. 1981.

Lee, LaJuana, Sallye Benoit, Wilma Moore, Celeste Powers, BUSINESS COMMUNICATIONS. Rand McNally Publishing Company. Chicago, IL. pp. 309-19. 1980.

Stull, William A., and Robert H. Zedlitz. COOPERATIVE WORK EXPERIENCE MANUAL. South-Western Publishing Company, Cincinnati, OH. pp. 247-252. 1984.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 208-213. 1980.

2.0 **COMPETENCY:** Obtains employment.

2.2 **TASK:** Locates job openings for which the applicant is qualified.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific occupational title,

EVALUATION: locates information about a job opening for which the applicant is qualified.

STANDARD: A written report will include information related to a job and resources used to find the information.

STUDENT LEARNING EXPERIENCES:

1. List specific jobs for which applicant is qualified, and which match career interests.
2. Name locally available sources of job opening information.
3. Find information on current job openings.
4. Analyze the work skills and personal characteristics needed for a job opening from information in announcements or advertisements.
5. Compare how a job matches with work interests, career goals, and qualifications.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have the class discuss the different scources for job information. Write the sources on the board and talk about the advantages and disadvantages of each.

2. Have students with similar interest locate information about various jobs. Have the students write a group report.

3. Have each student write a report on a job of their interest.

RESOURCES:

Bikkie, James, A. CAREERS IN MARKETING, Gregg Division, McGraw-Hill Book Company, New York, NY. pp. 139-144. 1978.

Daggett, Willard R., THE DYNAMICS OF WORK, South-Western Publishing Co., pp. 62-67. 1984.

Stull, William A. and Robert H. Zedlitz. COOPERATIVE WORK EXPERIENCE MANUAL. South-Western Publishing Co., Cincinnati, OH. pp. 257-260. 1984.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 203-207. 1980.

2.0 **COMPETENCY:** Obtains employment.

2.3 **TASK:** Develops a neat, accurate, and appropriate application letter.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a potential employment opportunity,

EVALUATION: develops a neat, accurate, and appropriate application letter.

STANDARD: The application letter will be typed without error, and include an opening, description of qualifications, and a closing which requests further consideration.

STUDENT LEARNING EXPERIENCES:

1. Explain the purpose and use of a letter of application.
2. Describe the characteristics of an effective application letter.
3. Identify what should be included in a letter of application.
4. Draft a letter of application for a specific job opening.
5. Evaluate examples of letters of application and make suggestions for improvements.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have the class go through several examples of letters of application and correct them. Then compose a letter of application to ficticious business.
2. In small groups correct letters of application and compose one to be presented to the class.
3. Have each student compose a letter of application.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Samples of application letters

RESOURCES:

Daggett, Willard R., THE DYNAMICS OF WORK, South-Western Publishing Co., Cincinnati, OH. pp. 71-72. 1984.

Meyer, Warran G., Peter G. Haines, Edward E. Harris, RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. pp. 35-36. 1982.

Samson, Harland E. RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. Chapter 54. 1982.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 214-217. 1980.

2.0 **COMPETENCY:** Obtains employment.

2.4 **TASK:** Completes a neat and accurate job application form.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a job application form,

EVALUATION: completes the application.

STANDARD: Application form will be neat, accurate, and fully completed.

STUDENT LEARNING EXPERIENCES:

1. Describe the steps to be used when filling out an application form.
2. Describe the types of information which can be requested on a job application.
3. Compile references to be used on an application.
4. Compile data on experiences pertaining to a job.
5. Evaluate examples of completed job applications on the basis of neatness, accuracy, and completeness.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. As a class, go through job application form and discuss each section and the steps in filling one out.
2. Have each student fill out an application form to be evaluated by the instructor.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

1. Samples of application forms.

RESOURCES:

Kimbrell, Grandy., Ben S. Vineyard. ACTIVITIES FOR SUCCEEDING IN THE WORLD OF WORK, Glencoe Publishing Company, Encino, CA. pp. 33-36. 1972.

Meyer, Warren G., Peter G. Haines, Edward E. Harris, RETAILING PRINCIPLES AND PRACTICES, Gregg/McGraw-Hill Book Company, New York, NY. p. 41. 1982.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 229-234. 1980.

2.0 **COMPETENCY:** Obtains employment.

2.5 **TASK:** Arranges for a job interview and appears on time.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given an opportunity for a job interview,

EVALUATION: arranges for the interview by making an appointment and appearing on time.

STANDARD: Contact with potential employer will indicate student made the appointment and appeared on time for interview.

STUDENT LEARNING EXPERIENCES:

1. Explain why an appointment is recommended.
2. Explain why being on time for an interview is important.
3. Demonstrate telephone contact with potential employer to set up an interview.
4. Describe the planning necessary to arrive on time for a job interview appointment.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. As a class discuss the importance of making an appointment for a job interview and being on time for the interview. Role play a person who is on time, an a person who is late for an interview.
2. In small groups discuss the advantages making an appointment and being on time.
3. Have each individual student set up an appointment and go on a job interview.

INSTRUCTIONAL EQUIPMENT, MATERIAL, SUPPLIES:

1. Telephone.

RESOURCES:

Kimbrell, Grady, Ben S. Vineyard. SUCCEEDING IN THE WORLD OF WORK. Glencoe Publishing Company, Encino, CA. pp. 43-44. 1975.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 226-228. 1980.

2.6 **TASK:** Researches a company to determine possible interview questions.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the name of a company and a position to be interviewed for,

EVALUATION: researches the company to determine possible interview questions.

STANDARD: A written report on the given company includes ten possible interview questions and an appropriate response for each.

STUDENT LEARNING EXPERIENCES:

1. Explain why researching a company before an interview is important.
2. Identify sources of information about local employers.
3. Describe the types of information which are helpful in preparing for a job interview.
4. Describe the types of questions which might be asked in a job interview.
5. Locate information for specific employers.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. As a class, discuss the importance of researching a company and what should be of concern when researching a company. List potential questions that might be asked during an interview.
2. In small groups, role play an interview situation. Have one person be the interviewer and all the others be the interviewer. Have the interviewer select the best applicant.
3. Have each student research a company and list potential questions which might be asked during an interview.

INSTRUCTIONAL EQUIPMENT, MATERIALS, SUPPLIES:

1. Video camera, video cassette recorder, video cassete tape.

RESOURCES:

Bolles, Richard N., WHAT COLOR IS YOUR PARACHUTE., Ten Speed Press, Berkeley CA. pp. 164-196. 1982.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. p. 243. 1986.

2.7 **TASK:** Presents an appropriate appearance for a job interview.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given an interviewing situation,

EVALUATION: presents an appropriate appearance for a job interview.

STANDARD: Appearance will be appropriate for the desired position as determined by guidelines established by the interviewer.

STUDENT LEARNING EXPERIENCES:

1. Explain the importance of appropriate dress and grooming in an interview.
2. Differentiate between appropriate clothing and inappropriate clothing for a job interview.
3. Select appropriate clothing for an interview.
4. Describe appropriate grooming for an interview situation.
5. Describe dress and grooming which should be avoided in job interview situations.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have all students dress for one day as if they were being interviewed for a management or MARKETING POSITION. Discuss what would be appropriate and inappropriate dress for this position.

2. In small groups have them stage a job interview situation and role play an appropriately dressed indivdual and an inappropriately dressed individual. The students can discuss what they learned from the situation.

3. Send each student on a job interview and have them do a self-evaluation on the dress.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

RESOURCES:

Bolles, Richard N., WHAT COLOR IS YOUR PARACHUTE Ten Speed Press, Berkeley, CA. pp. 177. 1982.

Golden, Nancy, DRESS RIGHT FOR BUSINESS. McGraw-Hill Book Company, New York, NY. 1986.

Kimbrell, Grady, Ben S. Vineyard. SUCCEEDING IN THE WORLD OF WORK, Glencoe Publishing Company, Encino, CA. pp. 42-43.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 218-225. 1980.

2.8 **TASK:** Demonstrates confidence in a job interview situation.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a job interview situation,

EVALUATION: demonstrates confidence in the interview.

STANDARD: The interviewee will smile, give a firm handshake, sit erect, answer questions clearly and concisely, have good eye contact and avoid distracting habits.

STUDENT LEARNING EXPERIENCES:

1. Explain the reasons why an interviewee should demonstrate confidence.
2. Describe job interview behaviors which demonstrate confidence.
3. Describe techniques for answering questions in a manner which demonstrates confidence.
4. Describe comments and behaviors which should be avoided.
5. Answer questions which are frequently asked in job interviews.
6. Describe the technique to be used when an interviewer asks a question which the applicant feels is inappropriate or illegal.
7. Describe the types of questions which the applicant may properly ask of the interviewer.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have the class participate in a role-play situation. One student is the interviewer, the other is the INTERVIEWEE. Video record the situation and discuss the techneques used and techniques that could be used.
2. In small groups have students role play interviewer-/interviewee. The other students evaluate the situation and report their finding to the instructor.
3. Have each student interview with the instructor.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Video camera, video cassette recorder, video tape.

RESOURCES:

Daggett, Willard R., THE DYNAMICS OF WORK, South-Western Publishing Company, Cincinnati, OH. pp. 79-81. 1984.

Meyer, Warren G., Peter G. Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, Gregg/McGraw-Hill Book Company, New York, NY. p. 41. 1982.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 243-251. 1986.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 236-239. 1980.

2.0 **COMPETENCY:** Obtains employment.

2.9 **TASK:** Follows up on employment contacts in writing and/or by telephone.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a completed job interview,

EVALUATION: follows up on employment contact in writing and/or by telephone.

STANDARD: A letter, typewritten without errors, or a phone call, thanks the interviewer for the interview and reinforces interest and qualifications.

STUDENT LEARNING EXPERIENCES:

1. Explain the purpose and importance of follow up.
2. Describe who you should contact in the follow up letter or telephone call.
3. Outline a follow up letter thanking the interviewer for the interview and reinforcing the qualifications for the job.
4. Demonstrate telephone techniques for a follow-up call for a job interview.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. As a class discuss the importance of a follow up letter or telephone call. Go through an example of a follow up letter.
2. In small groups have students share with each other how they did their follow up and what kind of response they received if any. Have one student report on the groups discussion.
3. Have each student compose a follow up letter.

INSTRUCTIONAL EQUIPMENT, MATERIAL, AND SUPPLIES:

1. Samples of follow up letters.

RESOURCES:

Bolles, Richard N., WHAT COLOR IS YOUR PARACHUTE, Ten Speed Press, Berkeley, CA. pp. 157-158. 1982.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 250-253. 1986.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 240-244. 1980.

COMMUNICATIONS

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.1 **TASK:** Utilizes correct vocabulary, grammar and spelling.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of situations which require a written response,

EVALUATION: utilizes correct vocabulary and grammar in spelling and writing.

STANDARD: All responses are free of vocabulary, grammar, and spelling errors.

STUDENT LEARNING EXPERIENCES:

1. Explain why the use of correct grammar, vocabulary, and spelling is important.
2. List words that are often misused. (Example: access-excess) and describe the correct use of each term.
3. Restructure poorly-written sentences and paragraphs, and those with inappropriate words.
4. Identify incorrectly spelled words in a document and provide the correct spelling of each.
5. Rewrite paragraphs which contain vocabulary, grammar, and spelling errors.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have students as a class correct a paragraph which has a variety of errors.

2. In small groups have students correct paragraphs. After they are finished have them compare their corrected paragraph with another group.

3. Have each student anonymously write a paragraph on the same topic. Allow students to evaluate each paragraph and select the best examples.

INSTRUCTIONAL EQUIPMENT, MATERIAL AND SUPPLIES:

1. Samples of incorrect paragraphs.

2. Dictionary.

RESOURCES:

Huseman, Richard C., James M. Lahiff, John D. Hatfield. BUSINESS COMMUNICATIONS STRATEGIES AND SKILLS, Holt Rinehart, and Winston Publishers, New York, NY. pp. 97-110. 1981.

Lee Lajuana W., Sallye S. Benoit, Wilma C. Moore. BUSINESS COMMUNICATIONS, Rand McNally College Publishing Company, Chicago, IL. pp. 129-40, 151-61. 1980.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.2 **TASK:** Uses neat handwriting to prepare forms, messages and records.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given information for a series of business forms, messages, and records,
EVALUATION:	used neat handwriting or printing to prepare the forms, messages and records.
STANDARD:	The completed documents will each be legible and accurate.

STUDENT LEARNING EXPERIENCES:

1. Explain why neat handwriting and printing is important when preparing business documents.
2. Copy written and oral information on a series of reports and forms.
3. Evaluate the legibility of sample documents and recommend improvements.

SUGGESTED INSTRUCTIONAL TECHNIQUES;

1. Give the class verbal instructions to transcribe, and have students exchange papers to evaluate neatness and accuracy.
2. In small groups have students role play customer/salesperson. The sales order is evaluated on neatness and accuracy.
3. Using a training manual, each student will copy given information for specified forms and records.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

1. Samples of sales checks, purchase orders, and other forms.

RESOURCES:

Ditzenberger, Roger and John Kidney, SELLING: HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinnati, OH. pp. 269-270. 1981.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.3 **TASK:** Reads and understands forms, reports, and computer printouts.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a variety of forms, reports, computer printouts, and product information sources,

EVALUATION: reads and understands forms, reports, and computer printouts.

STANDARD: Accurately answer questions on each document.

STUDENT LEARNING EXPERIENCES:

1. Define skimming, scanning and intensive reading, and describe when each technique is appropriate.
2. Describe techniques to improve reading speed and comprehension.
3. Read and summarize information from various forms, reports, printouts and product information sources.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present samples of various forms, reports, computer printouts and product information sources. Have the class interpret the documents. Have the class give reasons why these documents might be used in business.

2. Break the class up in groups of 4-5. Give each group a different packet containing a variety of forms, report, computer printouts and product information. Each group will write a summary interpreting the documents. Have each group prepare a presentation explaining the documents.

3. Get copies of TIME magazine and READERS DIGEST. Have students compute the readability on three randomly selected paragraphs.

4. Give each student a packet containing various forms, reports, computer printouts and product information, Each student should read and summarize the documents.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

1. Sample forms, reports, computer printouts, and product information sources.

2. Sample business periodicals.

RESOURCES:

Huseman, Richard L., James M. Lahiff, and John D. Hatfield. BUSINESS COMMUNICATIONS STRATEGIES AND SKILLS. Holt, Rinehart and Winston Publishers, pp. 92-94. 1981.

Rowe, Kenneth L., COMMUNICATIONS IN MARKETING. Gregg/McGraw-Hill Book Company, New York, NY. pp. 73-81. 1978.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 263-271. 1980.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.4 **TASK:** Gathers data from books, manuals, directories or other sources.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a topic or problem and access to appropriate data sources,

EVALUATION: gathers data from books, manuals, directories or other documents on the given topic.

STANDARD: The student is able to locate the data related to the topic or problem as previously determined by the instructor.

STUDENT LEARNING EXPERIENCES:

1. Explain the importance of gathering the appropriate information when solving a problem or researching a topic.
2. Describe characteristics of data sources, such as timeliness, scope, accuracy, and bias.
3. List appropriate sources for a given topic and where they are located.
4. Obtain specific information from provided resources.
5. Cite reference documents in the correct format.

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SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Ask the librarian to present information on locating and using reference sources.
2. Choose a broad subject to research.(Examples might be the economy, marketing management, etc.) break the subject into smaller segments and have the class research the segments.
3. Have each student gather data for a specific topic.

INSTRUCTIONAL EQUIPMENT, MATERIAL AND SUPPLIES:

Reference documents at school or local library.

RESOURCES:

Harris, E. Edward. MARKETING RESEARCH. Second Edition. McGraw-Hill, New York, NY. 1978.

Lee, Lajuana W., Sallye S. Benoit, Wilma C. Moore. BUSINESS COMMUNICATIONS, Rand McNally College Publishing Company, Chicago, IL. pp. 337-70. 1980.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.5 **TASK:** Composes business correspondence.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a situation which requires a written response,

EVALUATION: composes business correspondence.

STANDARD: The correspondence will contain the standard elements, answer the stated problem, and be accurately written.

STUDENT LEARNING EXPERIENCES:

1. Describe the common forms of business correspondence (i.e. memo, letter) and their appropriate use.
2. Describe the components of a business memorandum.
3. Describe the components of a business letter.
4. Draft a business letter for a specific situation.
5. Evaluate business correspondence and make suggestions for improvement

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present samples of business letters which are inappropriate. Have the class work together to correct the problems in formating.
2. In small groups, correct business letters.
3. Have each student correct, and/or modify an existing business letter.

INSTRUCTIONAL EQUIPMENT, MATERIAL, AND SUPPLIES:

1. Samples of business letters.

RESOURCES:

Himstreet, William C., Leonard J. Porter, Gerald W. Maxwell. BUSINESS ENGLISH IN COMMUNICATIONS, Prentice Hall Inc., Englewood Cliffs, NJ. pp. 179-187, 338-350. 1975.

Rowe, Kenneth L., COMMUNICATIONS IN MARKETING, Gregg/McGraw-Hill Book Company, New York, NY. pp. 87-99. 1978.

Williams, John W. and Steven Eggland. COMMUNICATIONS IN ACTION. South-Western Publishing Company, Cincinnati, OH. 1985.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 272-282. 1980.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.6 **TASK:** Composes business reports.

PERFORMANCE OBJECTIVES:

CONDITIONS: Given data related to a specific business situation,

EVALUATION: composes business reports.

STANDARD: The business report will contain the relevant data, be logically organized, and be written in an acceptable business style.

STUDENT LEARNING EXPERIENCES:

1. Describe the characteristics of an effective business report.
2. List the steps in outlining a report.
3. Evaluate business reports for style, effectiveness, and creativity.
4. Prepare an outline for a report.
5. Draft a report on a specific topic or problem.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. As a class, set us a typical outline of a report. Discuss how this outline would be used to complete a final copy of the report.
2. Have the students work in small groups to develop an outline and compose a report on marketing or management.
3. Have each student write a report on a marketing related subject.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sample reports.

RESOURCES:

Himstreet, William C., Leonard J. Porter, Gerald W. Maxwell. BUSINESS ENGLISH IN COMMUNICATIONS. Prentice-Hall Inc. Englewood Cliffs, NJ. p. 179-187, 338-350. 1975.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 112-122. 1986.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.7 **TASK:** Develops business forms.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a situation where a standardized business forms would be appropriate, and a list of data to be obtained,

EVALUATION: develops business forms.

STANDARD: The business form will contain all of the required data elements, and be understandable by those who will complete the form.

STUDENT LEARNING EXPERIENCES:

1. Explain the purpose for using standardized business forms.
2. List and describe several business forms.
3. Evaluate existing business forms and make suggestions for improvement.
4. Construct a new form using the information provided.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. As a class design a sales check form that might be used in a retail business.
2. In small groups organized on the basis of career interest, have students design specific forms for that type of business.
3. Have each individual design a specific form.

INSTRUCTIONAL EQUIPMENT, MATERIAL AND SUPPLIES:

1. Typewriter, word processor, or typesetter.
2. Sample of business form.

RESOURCES:

Meyer, Warren G., Peter G. Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES Gregg/McGraw-Hill Book Company, New York, pp. 227-228, 492-497. 1982.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.8 **TASK:** Listens effectively to co-workers, supervisors and customers.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given a variety of verbal instructions,
EVALUATION:	listens effectively to co-workers, supervisors and customers.
STANDARD:	Correctly answer a series of questions regarding the verbal instructions.

STUDENT LEARNING EXPERIENCES:

1. Describe the characteristics of a good listener.
2. Differentiate between an active and passive listener.
3. Describe how bias can hamper effective communications, and how it can be reduced.
4. Repeat instructions after carefully listening to them.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have 5 students go into another room. Read a set of instructions to the class and have them take notes. Bring in one student at a time and have them repeat the instructions to each other. Have the class take notes on any deviations.

2. In small groups have a student give a set of instructions on a specific drawing. The other student must draw the picture without asking any questions.

3. Ask each student to analyze all speakers they hear during an entire day. Have them determine which speakers are easiest to listen to and why.

INSTRUCTIONAL EQUIPMENT, MATERIAL, AND SUPPLIES:

1. Tape recorder.

2. Sample set of instructions.

RESOURCES:

Himstreet, William C., Leonard J. Porter, Gerald W. Maxwell. BUSINESS ENGLISH IN COMMUNICATIONS. Prentice-Hall Inc., Englewood Cliffs, NJ. pp. 379-387. 1975.

Rowe, Kenneth L., COMMUNICATION IN MARKETING Gregg/McGraw-Hill Book Company, New York, NY. pp. 17-30. 1978.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 90-94. 1986.

William, John W., Steven A. Eggland. COMMUNICATION IN ACTION. South-Western Publishing Company, Chicago IL. 1985.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 256-262. 1980.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.9 **TASK:** Asks appropriate questions to clarify another's communications.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the opportunity to listen to an oral presentation,

EVALUATION: asks appropriate questions to clarify another's oral communications.

STANDARD: The listener correctly identifies statements which might cause misunderstanding and develops an appropriate question to clarify each statement.

STUDENT LEARNING EXPERIENCE:

1. Explain the importance of asking questions for effective communication.
2. Outline the main points of a presentation.
3. Write a series of questions pertaining to a given presentation.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have each student prepare a five minute informative speech. The other class member must write five questions they might ask the presenter related to the topic selected.

2. Have students select a partner. Each person is to prepare a five minute presentation of a business activity that is of particular interest. Each partner will critque the other presentation and will write five questions an audience might ask.

3. Have a student listen to a tape recorded presentation on an individual basis. Have each student outline the recording and write five questions pertaining to the presentation.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

1. Tape recorder.

2. Recorded tapes of various presentations.

RESOURCES:

Huseman, Richard C., James M. Lahiff, John D. Hatfield. BUSINESS COMMUNICATIONS STRATEGIES AND SKILLS. Holt, Rinehart, and Winston Publishers, New York, NY. pp. 272-92. 1981.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 258-259. 1980.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.10 **TASK:** Speaks clearly and distinctly with individuals and groups.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a business-related topic,

EVALUATION: organizes and delivers a five-minute speech on a business related subject.

STANDARD: The speech will contain an introduction, body, and conclusion, and will be evaluated using a previously determined evaluation instrument.

STUDENT LEARNING EXPERIENCES:

1. Describe tone, volume, and enunciation and how they effect spoken communications.
2. Describe the characteristics of an effective speech.
3. Develop and outline a speech.
4. Respond to a series of impromptu questions in front of an audience.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have each student deliver a five minute speech to the entire class. Record their speech on a video camera. Each student will critique his speech and write a one-or two page paper describing changes to be made if the speech were to given again.

2. In groups of four or five have each student prepare a presentation on a given subject. Following the presentation have each member of the small group evaluate the presentor.

3. Ask a local Toastmasters club to conduct their youth leadership program within the class. This 6-8 week program focuses on speaking and listening skills.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

1. Video camera, video camera recorder, and monitor.

2. Tape recorder.

RESOURCES:

Huseman, Richard C., James M. Lahiff, John D. Hatfield. BUSINESS COMMUNICATIONS STRATEGIES AND SKILLS, Holt, Rinehart, and Winston Publishers, New York, NY. pp. 280-92. 1981.

Lee, Lajuana W., Sallye S. Benoit, Wilma C. Moore. BUSINESS COMMUNICATIONS, Rand McNally College Publishing Co., Chicago, IL. pp. 358-62. 1980.

Rowe, Kenneth L., COMMUNICATIONS IN MARKETING, Gregg/McGraw-Hill Book Company, New York, NY. pp. 31-33. 1978.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 84-89, 103-109. 1986.

Williams, John W. and Steven Eggland. COMMUNICATION IN ACTION. South-Western Publishing Company, Cincinnati, OH. 1985.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.11 **TASK:** Utilizes the telephone in an efficient and businesslike manner.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of situations in a work environment,

EVALUATION: utilizes the telephone in an efficient and businesslike manner.

STANDARD: Telephone techniques will demonstrate concentration, outlining call, note taking, and a clear, pleasant voice.

STUDENT LEARNING EXPERIENCES:

1. Explain the importance of outlining a call you initiate.
2. Explain the importance of accurate note taking for all calls.
3. Demonstrate effective telephone practices for placing callers on hold, transfering calls, and taking messages.
4. Organize and place business calls.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have students s a class discuss proper phone etiquette. Give examples of both proper and improper phone etiquette.
2. In groups of three have two students role-play customer-business relations. Utilizing the phone. The business person should prepare an outline and be ready to take notes. the third person should evaluate the situation. Reverse role until all students complete the cycle.
3. Have each student prepare an outline for a business call. After the outline is complete have them make their call and record them for evaluation.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Telephone.
2. Tape recorder.

RESOURCES:

Huseman, Richard C., James M. Lahiff, John D. Hatfield. BUSINESS COMMUNICATIONS STRATEGIES AND SKILLS, Holt, Rinehart and Winston Publishers, New York, NY. pp. 390-92. 1981.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 95-102. 1986.

3.0	**COMPETENCY:**	Communicates with customers, co-workers and supervisors.

3.12 **TASK:** Reports status and progress to management.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given a project or task in a work situation,
EVALUATION:	reports status and progress to management.
STANDARD:	The report will be completed in a memorandum to an employer, and include a description of the task, current status, and projected future actions.

STUDENT LEARNING EXPERIENCE:

1. Explain the purpose of progress reports and why they are important in a subordinate/supervisor relationship.
2. Describe the different methods of communication which an employee might use in reporting progress to management.
3. Draft a memorandum to management reporting the progress on a specific project or task.
4. Demonstrate verbal discussions with supervisors on a current projects status.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. As a class, discuss techniques for reporting status on projects to management. If students are employed, encourage them to share specific examples of how they have done on the job.
2. Have small groups role play employee and supervisor. The employee should demonstrate reporting a project which is behind schedule. The supervisor is concerned with this project because other activities are being delayed.
3. If students are involved in a coop program, ask them to record on their weekly logs, specific instances of reporting progress to a supervisor.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

RESOURCES:

Crawford, Lucy C. SUPERVISORY SKILLS. McGraw-Hill Book Company, New York, NY. pp. 7-9. 1978.

Rowe, Kenneth L., COMMUNICATIONS IN MARKETING. Gregg/McGraw-Hill Book Company, New York, NY. pp. 1-5. 1978.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill, New York, NY. pp. 209-216. 1986.

Williams, John W., Steven A. Eggland. COMMUNICATION IN ACTION. South-Western Publishing Company, Cincinnati, OH. pp. 31-65. 1985.

3.0 **COMPETENCY:** Communicates with customers, co-workers and supervisors.

3.13 **TASK:** Brings concerns and suggestions to supervisors and management.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a work-related situation,

EVALUATION: brings concerns and make suggestions to supervisors and management in a professional manner.

STANDARD: A written suggestion memo will be positive, concise and use appropriate language.

STUDENT LEARNING EXPERIENCES:

1. Define and describe upward communication.
2. Describe the types of messages that are communicated upward.
3. Evaluate situations to determine if suggestions to management are appropriate.
4. Describe effective techniques for bringing concerns to management.
5. Verbally bring concerns and suggestions to supervisor and management.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Examine how specific suggestions should be handled. Role play manager/employee situation and discuss out-come.
2. Have students work in small groups sharing with each other concerns about their jobs.
3. Have each student write a report about job concerns and suggestions.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Crawford, Lucy C. SUPERVISORY SKILLS. McGraw-Hill. New York, NY. pp. 7-9. 1978.

Rowe, Kenneth L., COMMUNICATIONS IN MARKETING, Gregg/McGraw-Hill Book Company, New York, NY. pp. 1-5. 1978.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 209-216. 1986.

Williams, John W., Steven A. Eggland. COMMUNICATION IN ACTION. South-Western Publishing Company, Cincinnati, OH. pp. 31-65. 1985.

MATH

4.0 COMPETENCY: Performs payroll calculations.

4.1 TASK: Calculates basic salary, overtime, commission, and quota.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given data for a payroll for a group of employees,

EVALUATION: calculates basic salary, overtime, commission, and quota.

STANDARD: All arithmetic calculations must be correct and the gross salary of each employee must be accurate.

STUDENT LEARNING EXPERIENCES:

1. Describe payroll terms: salary, overtime, commission, quotas and hourly.
2. Calculate gross earnings using hourly rate of pay.
3. Calculate overtime earnings.
4. Calculate gross earnings for employees who are paid on commission.
5. Explain quota/incentive pay.
6. Calculate total pay for an employee using the quota method.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss the concepts of regular time, overtime premiums, piecework, and commissions. Include the incentife value of each plan as well as the methods of calculation.
2. In small groups, allow students to compare pay plans to determine what plan would earn the most.
3. Ask students individually to analyze actual or simulated paycheck stubs.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Calculator.
2. Payroll ledger.
3. Handout on Fair Labor Standards Act of 1938, and other handouts explaining the concept of double time, piece rate and commissions.

RESOURCES:

Martinka, Marie, James L. Southam. VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp. 291-294.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th edition, Scott Foresman and Company, Glenview, IL. pp. 147-165. 1987.

Stull, William A. and Robert A. Zedlitz. COOPERATIVE WORK EXPERIENCE MANUAL. South-Western Publishing Company, Cincinnati, OH. pp. 171-178. 1984.

ACCOUNTING CURRICULUM, Az. Center for Voc Ed, Center for Excellence in Edu., NAU Flagstaff, Az., non-degreed Accountant pp. 22, Accounting Clerk pp. 12-14, bookkeeper pp. 19-21. 1985.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 388-392. 1980.

4.0 **COMPETENCY:** Performs payroll calculations.

4.2 **TASK:** Calculates deductions appearing on a paycheck.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given data for a payroll for several employees in a payroll ledger,

EVALUATION: calculates deductions for each paycheck and the total payroll.

STANDARD: All arithmetic calculations must be correct and the total deductions from all paychecks must balance with the summary total.

STUDENT LEARNING EXPERIENCES:

1. Describe the deductions that may be made from an employee's earnings.
2. Compute FICA tax using the current rate, making certain no employee is assessed more than legally required.
3. Determine the federal withholding tax from tables recognizing marital status, number of exemptions and frequency of pay period.
4. Determine the state withholding tax from tables or calculate as a percentage of federal withholding tax.
5. Determine any other withholdings (such as medical insurance).
6. Calculate total deductions for each employee and subtract from the gross pay.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss briefly the Federal Insurance Contributions Act passed in 1935. State that the base and rate change depending on action of congress. The employer must match the employee's contribution.

2. Discuss the federal income tax obligation of each person. Tax liability fluctuates based on number of exemptions and other deductions. The importance of the W-4 form could be emphasized.

3. Have students brainstorm to identify other deductions that could be taken out of paychecks (such as state and city income taxes, and/or medical insurances, union dues, and credit union payments.)

4. Allow each student to work independently to calculate a series of deductions.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Calculator.

2. Payroll ledger.

3. Current social security tax tables.

4. Schedule E withholding tax tables.

5. Form W-4.

RESOURCES:

Martinka, Marie, James L. Southam. VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp. 294-295. 1984.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th edition, Scott Foresman and Company, Glenview, IL. pp. 167-190. 1987.

Stull, William A. and Robert H. Zedlitz. COOPERATIVE WORK EXPERIENCE MANUAL. South-Western Publishing Company, Cincinatti, OH. pp. 163-170. 1984.

ACCOUNTING CURRICULUM, Az. Center for Voc Ed, Center for Excellence in Edu., NAU Flagstaff, Az., Non-degreed Accountant pp. 22, Accounting Clerk pp. 12-14, Bookkeeper pp. 19-21. 1985.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 412-429. 1980.

5.0 **COMPETENCY:** Uses tables and graphs.

5.1 **TASK:** Reads and interprets tables and graphs.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given data represented in tables and graphs,

EVALUATION: reads and interprets the data.

STANDARD: Accurately identify data from the tables and graphs as previously determined by the Instructor.

STUDENT LEARNING EXPERIENCES:

1. Describe how tables and charts are used to represent numerical data.
2. Read and analyze the data contained in a table.
3. Describe how the increments on a graph can distort the presentation of the data.
4. Read and analyze line, bar and circle graphs.
5. Compare different graphs to determine which is more easily understood.

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SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present data to the class using tables and graphs and discuss how visualizing data makes it easier to understand.
2. Allow students to work in groups, analyzing annual reports or other documents which contain tables and charts.
3. Assign students individually a series of graphs to read and interpret.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Reports or publications containing tables and graphs.

RESOURCES:

Martinka, Marie, James L. Southam. VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp. 345-352. 1984.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th edition, Scott Foresman and Company, Glenview, IL. pp. 551-554. 1987.

5.0 **COMPETENCY:** Uses tables and graphs.

5.2 **TASK:** Develops tables and charts.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a group of numbers in paragraph form,

EVALUATION: arranges the numbers in a table and use them to create graphs.

STANDARD: Table data should be listed systematically. Table data should be used to make at least three types of graphs: line, bar, and circle.

STUDENT LEARNING EXPERIENCES:

1. Describe how tables and charts can make data more easily understood headings.
2. List data in a table with appropriate row and column headings.
3. Construct a line graph for provided data.
4. Construct a horizontal or vertical bar chart for provided data.
5. Construct a circle chart for provided data.
6. Describe the use of line, bar, and circle graphs, and situations where each is most appropriate.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss the value of using tables and graphs. Give examples of how to arrange raw data into a meaningful sequence and how to plot that data on a graph.

2. Show pictures of tables and graphs with a short interpretation of the data.

3. Divide the class into small groups of 3 or 4 if it is a medium or large class. If the class is small, each student can work alone.

4. Demonstrate theuse of computer software to produce graphs and allow students to create their own graph.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Computer and graphics software.

2. Graph paper.

3. Ruler, protractor, and a compass

RESOURCES:

Martinka, Marie, James L. Southam. VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp. 345-352. 1984.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th edition, Scott Foresman and Company, Glenview, IL. pp. 551-554. 1987.

6.0 **COMPETENCY:** Processes sales transactions.

6.1 **TASK:** Calculates weights and measures.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of problems with measures of length, area, weight, volume, and time,

EVALUATION: calculates weights and measures.

STANDARD: All problems must be solved correctly and reported in the proper denomination/unit.

STUDENT LEARNING EXPERIENCES:

1. Define the denominations for measuring length, area, volume, weight and time.
2. Add, subtract, multiply and divide fractions.
3. Convert measurements from one unit to another (i.e. feet to inches, pounds to ounces.)
4. Add and subtract fractions and reduce to lowest terms.
5. Compute rectangular area, including irregular shapes.
6. Multiply different units of measure, such as price times weight.
7. Divide units of measure.
8. Compute unit price of a multiple price item.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Use a variety of product containers to illustrate the various units of measure. Discuss the type of calculations related to the products illustrated.
2. Allow students to work in small groups reviewing skill in calculating weights and measures.
3. Assign practice problems to be solved at the student's desk.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Calculators.
2. Problem handouts.
3. Measurement table handouts.

RESOURCES:

Martinka, Marie, James L. Southam. VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp. 149-178. 1984.

6.0 **COMPETENCY:** Processes sales transactions.

6.2 **TASK:** Calculates discounts and sales tax.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of sales invoices,

EVALUATION: calculates amounts of discounts and sales tax.

STANDARD: All calculations must be 100% correct on all problems.

STUDENT LEARNING EXPERIENCE:

1. Describe the reasons discounts and sales taxes are included in sales checks/invoices.
2. Multiply decimal numbers and reduce decimals to designated decimal places.
3. Compute discounts and taxes as a percentage of sales.
4. Demonstrate the use of tax charts to calculate sales tax.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Use a mock-up of a sales invoice and by using a marking pencil, illustrate writing at least two or three sales invoices that include multiple purchases, discounts and a sales tax.
2. After handing out a blank sales invoice, assign the entire class a problem to solve at their desk. If the class is small, peruse the work of each student and provide assistance if needed.
3. After each student has correctly done the sample problem, handout ten problems for the students to solve and record on sales invoices.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sales invoices and pencils.
2. Mock-up of a sales invoice.
3. Handout of ten problems.

RESOURCES:

Martinka, Marie, Southam, James L., VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, Southwestern Publishing Co., Cincinnati, OH. pp. 251-252. 1984.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th edition, Scott Foresman and Company, Glenview, IL. pp. 191-225. 1987.

Stull, William A., MARKETING MATH, Teacher's edition, South-Western Publishing Company, Cincinnati, OH. pp. 127-138. 1979.

Zaun, Duane, MATHEMATICS, Conrad Publishing Company, A Distributive Education Series, Minneapolis, MN. pp. 11-16. 1979.

6.0 **COMPETENCY:** Processes sales transactions.

6.3 **TASK:** Writes and computes sales invoices.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given blank invoices and supportive data,

EVALUATION: writes and computes sales invoices.

STANDARD: Arithmetic calculations must be accurate, handwriting must be legible and all pertinent data needed from the customer must be written on the invoice.

STUDENT LEARNING EXPERIENCES:

1. Write the customers name, address, and related data legibly on the invoice.
2. Record the items purchased on the invoice, (quantity, stock number, description and price).
3. Multiply the quantity and price to obtain extension.
4. Determine discounts, shipping charges, taxes, and related charges.
5. Compute totals on an invoice/sales check.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Introduce the subject by displaying a mock up of a sales invoice. Review each section of the invoice showing what needs to be filled in.

2. Allow students to work in small groups to discuss company policy in regards to sales discounts, promotion discounts, freight or other charges.

3. Have students individually collect examples of invoices from various sources and analyze the similarities and differences.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES

1. Calculator.

2. Sales invoices.

3. Sales tax tables.

4. List of discounts and terms.

RESOURCES:

Martinka, Marie, James L. Southam. VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, Southwestern Publishing Co., Cincinnati, OH. pp. 249-272. 1984.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th edition, Scott Foresman and Company, Glenview, IL. pp. 191-224. 1987.

HANDLING COD AND LAYAWAY SALES, Mathematics Lap 46, IDECC INC., pp. 1-24. 1983.

6.0 **COMPETENCY:** Processes sales transactions.

6.4 **TASK:** Completes charge sales transactions.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of charge sales,

EVALUATION: completes charge sales transactions.

STANDARD: Complete all parts of the charge sales check with 100% accuracy.

STUDENT LEARNING EXPERIENCES:

1. Describe procedures for completing a credit transaction.
2. Operate a credit card imprint machine to transfer customer information from a credit card on a charge sales check.
3. Complete a charge sales check by filling in each blank correctly.
4. Describe and demonstrate procedures for handling completed charge sales invoices.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. This task can be learned by repetition. Have students fill out a charge sales check by referring to a check-sheet. Then require the students to fill out the form without the check-sheet being available. If students worked in pairs, they could help each other to remember each item on the charge sales check.

2. Since these forms are changed periodically, secure blank forms from a bank or merchant so that the newest versions of the form are used.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Credit card imprint machine.

2. Nonvalid credit cards.

3. Blank charge sales check forms.

RESOURCES:

Stull, William A., MARKETING MATH, South-Western Publishing Company, Cincinnati, OH. pp. 115-118. 1979.

Pace Revised, MANAGING CUSTOMER CREDIT AND COLLECTIONS, The National Center For Research in Vocational Education, The Ohio State University, Columbus, OH. Level 1 and Level 3.

6.0 **COMPETENCY:** Processes sales transactions.

6.5 **TASK:** Approves and accepts customer and/or client checks.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given store policies and a series of customer checks,

EVALUATION: approves customer checks.

STANDARD: The checks are approved according to store policies.

STUDENT LEARNING EXPERIENCES:

1. Define and describe each component of a check.
2. Differentiate one-party and two-party checks.
3. Differentiate between a business check, payroll check, treasury check, money order and traveler's check.
4. Identify each check component which should be verified, including the bank routing numbers on the bottom of the check, the amount of dollars and cents written in figure and words, the date and signature.
5. Describe check endorsements and their effects.
6. Describe the procedure which should be used in accepting a customer's check.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a representative of a bank to discuss the processing of checks and procedures merchants should follow in accepting checks.

2. Have students role play check situations, with one as the customer and one as cashier. Use a variety of problems such as lack of identification, against store policy, etc.

3. Provide students with a collection of sample checks and allow them to evaluate the accuracy of each to determine if they would be approved.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sample checks to include one party, two party, business, payroll, treasury, money order and traveler's checks with four endorsement samples

RESOURCES:

Hephner, Thomas A., THE CASHIER, 2nd Edition, Gregg/McGraw Hill Book Company, New York, NY. pp. 39-60. 1984.

Martinka, Marie, James L. Southam. VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp. 206-298. 1984.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th Edition, Scott, Foresman and Company, Glenview, IL. p. 71. 1987.

CASHING CHECKS, 5th Edition, The National Cash Register Company, Dayton, OH. pp. 1-88. 1978.

6.0 **COMPETENCY:** Processes sales transactions.

6.6 **TASK:** Processes returns, refunds and exchanges.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of situations,

EVALUATION: processes returns, refunds and exchanges.

STANDARD: All problems must be mathematically correct and the proper form completed accurately.

STUDENT LEARNING EXPERIENCES:

1. Explain procedures for handling merchandise returns.
2. Process a return when the return is for an even dollar merchandise exchange.
3. Process a return when the return is for an uneven dollar merchandise exchange.
4. Describe the procedures when merchandise is returned for credit.
5. Process a cash refund by completing the appropriate form.
6. Describe the importance of properly documenting all return, refund, and exchange transactions.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss types of refunds, returns and/or exchanges expected in daily transactions. Use refund slips in explaining their purpose, and then fill out the form for at least two or three situations with use of overheads.

2. Demonstrate the cash register to illustrate its usage to issue a new sales receipt when there is an even and uneven merchandise exchange.

3. Have the students role play return and exchange situations, and complete the forms for a simulated business.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Cash register or calculator.

2. Refund slips.

3. Sales tax tables.

RESOURCES:

Levy, L., R. Feldman, E. Reich, BASIC RETAILING AND DISTRIBUTION, 3rd Edition, Pitman Publishing Co., pp 313-316. 1977.

Meyer, W. G., Peter G. Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES. 7th Edition. Gregg/McGraw-Hill Book Company, pp. 237-244. 1982.

Wingate, J. W., C. A. Holan. FUNDAMENTALS OF SELLING, 10th Edition, South-Western Publishing Company, pp. 395-398. 1976.

HANDLING RETURNS, Mathematics Lap 45, IDECC, Inc., pp. 1-28. 1983.

7.0 **COMPETENCY:** Operates point-of-sale equipment.

7.1 **TASK:** Makes change quickly and accurately.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a retail cash sales environment,

EVALUATION: makes change quickly and accurately.

STANDARD: Count change from the price of the sale to the amount of money tendered and as change computed by the cash register. Must be 100% accurate.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of accuracy and security in handling money.
2. Describe the two alternate methods of counting change, from the amount of sale and from computed change.
3. Describe and demonstrate the proper placement of currency and coin in a cash drawer.
4. Describe the process for observing and reporting counterfeit currency.
5. Count change to a customer from the amount of sale to the amount tendered.
6. Count change to a customer when the cash register has calculated the amount of change.
7. Count change when the amount tendered includes odd cents, (i.e. $14.53, amount tendered = $20.03).
8. Describe "short change artists" and the safeguards to be followed to avoid being short changed.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Demonstrate change counting techniques using both methods (from sale and from change).
2. Use a cash register or cash drawer and have students paired for role playing.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Cash register or cash drawer.
2. Denominations of money or fake money.
3. Sets of figures designated as total sales.

RESOURCES:

Hephner, Thomas A., THE CASHIER, 2nd edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 13-20. 1984.

Stull, William P., MARKETING MATH, Teacher's edition, South-Western Publishing Company, Cincinnati, OH. pp. 121-124. 1979.

Zaun, Duane, MATHEMATICS, Conrad Publishing Company, A Distributive Education Series, Minneapolis, MN. pp. 5-7. 1979.

7.0 **COMPETENCY:** Operates point-of-sale equipment.

7.2 **TASK:** Operates cash registers/terminals and related equipment.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of point-of-sale transactions,

EVALUATION: operates the point of sale equipment.

STANDARD: Properly record each sale, with 100% accuracy and within established timeframes.

STUDENT LEARNING EXPERIENCE:

1. Describe the importance of point-of-sale systems in terms of customer relations, data collection and financial control.
2. Describe the similarities and differences between manual and cash registers, electronic cash registers, and computer terminal systems.
3. Describe the functions performed by cash register/terminal systems, including use of departments, SKU, PLU, discounts and check/credit approval.
4. Record transactions on a cash register terminal with speed and accuracy.
5. Read a manual or electronic computing scale.
6. Describe the use of scanning systems, both slot and wand type.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a representative of a cash register company or a merchant to describe the latest technology in point-of-sale systems.
2. Have students work in teams to build speed and confidence completing various transactions.
3. Conduct a cash register tournament, where students compete by ringing a series of transactions. All entries must be accurate and time determines the winner.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

1. Cash register.
2. Real or simulated products to be checked out.
3. Handouts or manuals explaining parts and use of the equipment.

RESOURCES:

Hephner, Thomas A., THE CASHIER, 2nd edition, Gregg/McGraw-Hill Book Company, New York, NY. 1984.

EXPENSES IN RETAIL BUSINESS, National Cash Register Company, Dayton, OH. pp. 41-42. 1979.

7.0 **COMPETENCY:** Operates point-of-sale equipment.

7.3 **TASK:** Balances a cash drawer.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a daily balance form with procedural instructions,

EVALUATION: balances a cash drawer.

STANDARD: Record an accurate count of all coin and currency. The daily balance must be reconciled with sales and other transactions.

STUDENT LEARNING EXPERIENCES:

1. Explain why a cashier should avoid having large amounts of money in the drawer.
2. List the procedure to follow when buying cash during a shift.
3. Explain why a cashier must verify the amount in the change fund at the beginning of each shift.
4. Determine the sales and other data by reading the cash registers.
5. Compute the amount of cash which should be in a cash drawer.
6. Compute overage/shortage.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Guide the students through the steps in preparing a daily balance slip.
2. Have the students balance a cash drawer by using fake money, slips for cash paid out and cash register tapes for detailed audit strip.
3. Students could work in teams. One person would have the audit tape with the reconcilable figure and the other student must balance to that figure. Then they could switch role positions with a different reconcilable figure.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Daily balance slips.
2. Fake money.
3. Detailed audit strips.

RESOURCES:

Hephner, Thomas A., THE CASHIER, 2nd edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 22-25. 1984.

Stull, William A., MARKETING MATH, Teacher's Edition, South-Western Publishing Company, Cincinnati, OH. pp. 124-126. 1979.

Zaun, Duane, MATHEMATICS, Conrad Publishing Company, A Distributive Education Series, Minneapolis, MN. pp. 17-20. 1979.

PREPARING CASH DRAWERS, Mathematics Lap 47, IDECC Inc., pp. 1-20. 1983.

8.0 **COMPETENCY:** Performs pricing calculations.

8.1 **TASK:** Calculates trade, quantity, and cash discount.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of pricing problems,

EVALUATION: calculates trade, quantity and cash discounts.

STANDARD: All calculations will be completed using normal business procedures and will be accurate.

STUDENT LEARNING EXPERIENCES:

1. Define and describe trade discounts and chain discounts.
2. Calculate trade discounts, chain discounts, and net purchase price.
3. Describe quantity discounts and why they are used.
4. Calculate quantity discounts and net price.
5. Describe the use of cash discounts, and terms associated with purchase, including ROM, EOM, and EXTRA dating.
6. Calculate the amount of a cash discount and the final date to receive the discount under various terms.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss the use of discounts to encourage sales and speedy payment. Demonstrate the process for calculating the various discounts.
2. Allow students to work individually or in small groups if they are having difficulty in performing the calculations.
3. Have students collect information on discounts from catalogs, the school bookstore, an employer or other sources.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Calculator.

RESOURCES:

Martinka, Marie, James L. Southam. VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp. 249-290. 1984.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th edition, Scott Foresman and Company, Glenview, IL. pp. 197-246. 1987.

8.0 COMPETENCY: Performs pricing calculations.

8.2 TASK: Calculates markup and selling price.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of pricing problems,

EVALUATION: calculates markup and selling price.

STANDARD: All calculations will be completed using normal business procedures and will be accurate.

STUDENT LEARNING EXPERIENCES:

1. Define and describe markup.
2. Differentiate between markup as a percentage of cost and markup as a percentage of retail.
3. Compute retail price using cost and markup as a percentage of cost.
4. Compute percent of markup (both retail and cost) using cost and retail price.
5. Compute retail price using cost and markup as a percentage of retail price.
6. Compute maximum cost of an item for a given retail price and minimum markup (i.e. price line).

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Review the concept of markup with the class. Some students understand the basic equation (Retail = Cost + Markup), best if it is shown graphically.
2. Students often misunderstand the difference between markup on cost and markup on retail. Provide sufficient practice to emphasize the difference.
3. Allow students to work in small groups to increase their skill in making calculations.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Calculator.

RESOURCES:

Martinka, Marie, James L. Southam. VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp. 249-290. 1984.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th edition, Scott Foresman and Company, Glenview, IL. pp.197-246. 1987.

8.0 COMPETENCY: Performs pricing calculations.

8.3 TASK: Calculates markdown and selling price.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of pricing problems,

EVALUATION: calculates markdown and selling price.

STANDARD: All calculations will be completed using normal business procedures and will be accurate.

STUDENT LEARNING EXPERIENCES:

1. Define markdown and explain the reasons for markdown.
2. Calculate markdowns and new selling prices using a percentage of the original price.
3. Calculate percentage of markdown using original and reduced selling prices.
4. Define and describe markdown cancellation.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss the reasons for markdowns, both planned and unplanned. Review how markdowns are computed on the basis of the original price.

2. Provide students with a series of problems and allow them to work in teams or individually to determine the reduced price.

3. When a business is using a specific percentage of markdown for a series of products, they sometimes prepare a chart to speed calculations. Have students prepare a chart for a specific situation (i.e. 25% discount on items priced $3.95, 4.95, 5.95, 6.95, etc.).

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Calculator.

RESOURCES:

Martinka, Marie, James L. Southam. VOCATIONAL MATHEMATICS FOR BUSINESS, 3rd edition, South-Western Publishing Co., Cincinnati, OH. 1984.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th edition, Scott Foresman and Company, Glenview, IL. pp. 197-246. 1987.

SOCIAL SKILLS

9.0 **COMPETENCY:** Demonstrates responsible work habits.

9.1 **TASK:** Maintains a clean, neat, and appropriate personal appearance.

PERFORMANCE OBJECTIVE:

CONDITION: Given guidelines on business dress, and personal hygiene, and a school or work situation,

EVALUATION: maintains a clean, neat, and appropriate personal appearance.

STANDARD: Dress and groom appropriately for a designated period of time, as evaluated by established guidelines.

STUDENT LEARNING EXPERIENCES:

1. Explain the value of personal appearance in marketing occupations.
2. Identify desirable personal grooming habits.
3. Identify important considerations in dressing appropriately for the job.
4. Compare the differences in acceptable school dress and business dress standards.
5. Develop a plan for a work wardrobe. List all the things you currently own and a list of things you would need to purchase to work in a specific marketing position.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Ask a personnel director from a local store to come in as a resource speaker to talk abut appropriate personal appearance for work.

2. Lead a class discussion on appropriate work wardrobe, good grooming habits, selecting clothes that flatter and correct makeup & good personal hygiene.

3. Seek resource speakers to present specific areas to class. Suggested areas might be: a) color draping b) appropriate cosmetics and makeup c) hair stylists

4. Have a "Business Dress Day". Have students come to schooL dressed in appropriate business attire. Evaluate own grooming and critique your appearance using a three-way mirror. Critique each other in small groups to help those individuals who need improvement in certain areas.

5. Develop a checksheet for good grooming and business dress and have students rate themselves. Set goals for improving areas students checked as needing improvement.

6. Create an "in class" Fashion Show. Have each student wear what they believe to be an appropriate choice for work. Ask each student to describe the item on a 3 X 5 card and hand to person selected as commentator. Video take the fashion show and playback to critique.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Video camera, recorder, tripod, color monitor.
2. Three-way mirror.
3. Color draping materials.

RESOURCES:

Conover, Hobart, H. Milton K. Berlye, Sanford D. Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA. pp. 330-343. 1982.

Golden, Nancy, DRESS RIGHT FOR BUSINESS. McGraw-Hill Book Company, New York, NY. 1986.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 28-70. 1986.

Leonard, Karen, Personal Appearance, Lap 19. IDECC Inc., The Ohio State University, Columbus, OH. 1981. Part of the Human Relations Core Curriculum from IDECC. Topics covered are Appearance and Personality: 1st impressions, health practices, personal grooming, appropriate dress. Teachers guide accompanies with many excellent teaching ideas and student activity ideas.

9.2 **TASK:** Demonstrates regular attendance and punctuality.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a classroom or work situation,

EVALUATION: demonstrates regular attendance and punctuality.

STANDARD: Attend class/work on time with needed materials and being on task 100% of the time for a specified time period.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of regular attendance and punctuality in the work place.
2. Describe personal practices which can deter good attendance and techniques to avoid these problems.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite local personnel director to speak to class on importance of attendance in getting, keeping and progressing on a job.

2. Divide the class into equal groups to develope posters or bulletin borads. One half of the groups will make posters showing responsible behavior and one half wil stress irresponsible behavior.

3. Make each student responsible for his or her attendance. Should it be necessary for a student to be absent, he or she should call the classroom telephone before class begins. When he or she returns, the student should get assignments form "class buddy" system and them make up the absence with periodical report on topic covered during absence. This sounds routine but bridges the gap to "business expectations" and teaches students to be accountable for missed time.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Poster board, construction paper, scissors, felt tip pens.
2. Old magazines.

RESOURCES:

Conover, Hobart H., Milton K. Berlye, Sanford F. Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA. pp. 359-372. 1982.

Rieken, Jeri Lyn, Gail House. SUCCEEDING ON YOUR OWN, Harcourt Brace Jovanovich, Publishers, Orlando, FL. pp. 85-86. 1986.

Leonard, Karen. ACTING RESPONSIBLY. Lap 5. IDDEC, INC, Ohio State University, Columbus, OH. 1980. A Learning Activity Package that is part of the Human Relations competencies in the Ohio State Interstate Consorsium. Covers responsible behavior, importance of behaving responsibly and demonstrating business responsible behavior. Teachers guide contains many teaching ideas and student small and large group activities. Also gives Pre and Post written tests.

9.0 **COMPETENCY:** Demonstrates responsible work habits.

9.3 **TASK:** Accomplishes tasks without need for immediate supervision.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a task or series of tasks,

EVALUATION: accomplishes tasks without need for immediate supervision.

STANDARD: Evidenced by successful accomplishment of the tasks.

STUDENT LEARNING EXPERIENCES:

1. Define the following terms: responsible, dependable, motivation, self-starting.
2. Differentiate between intrinsic and extrinsic motivation.
3. Explain why it is important to understand what is expected before one can take ownership in the task and complete it without supervision.
4. Explain why short term goals are important to enable a person to work without constant supervision.
5. Practice accomplishing tasks without immediate supervision.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Lead a class discussion describe the importance of being able to complete tasks/goals without constant supervision. Stress their responsibility for finding out what is expected, the time limit, the criteria for evaluation, and the purpose (bigger picture).

2. Give students the opportunity to work independently by assigning independent study 2 days a week for a nine week period. Set up a contract with the students in advance on how much work must be accomplished to satisfy grade requirement. Students should be allowed to study an area that is directly related to their career interest or training station. Do not give constant supervision. Help only when asked.

3. The youth organization DECA gives an excellent opportunity for students to learn to take responsibility and follow through on a task without constant teacher supervision and snoopervision. While planning any large DECA project the teacher can list all the tasks and timelines needed. Assign tasks (or students can volunteer) and then be available for consultation. Do not make decisions for students but lead them in making the decisions and working on their own.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Career material.

2. Independent study materials such as the Gregg Manuals Contracts.

3. Plan of work worksheets

RESOURCES:

Leonard, Karen K., ACTING RESPONSIBLY, The Ohio State University, Columbus, OH. Human Relations, Lap #5, IDECC, INC., 1980, Student & teacher copies.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 324-328. 1980.

9.0 **COMPETENCY:** Demonstrates responsible work habits.

9.4 **TASK:** Demonstrates initiative.

PERFORMANCE OBJECTIVE:

CONDITION: Given a task to perform in a school or work situation,

EVALUATION: demonstrates initiative.

STANDARD: Student is observed exceeding the expected standard for the task without being directed to do so.

STUDENT LEARNING EXPERIENCES:

1. Define the term "initiative".
2. Explain the importance of initiative to employees in a work situation.
3. Describe a process for determining whether a task which needs to be performed and which has not been assigned, should be completed.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Lead a class discussion on the importance of initiative in the work place. Ask for examples of things students have done in the past which showed initiative. What was the result of initiative on others. Ask the question: Can one use too much initiative? How? Results?

2. Divide the class ino small groups and assign to develop a poster showing at least 10 ways to show initiative on a job/training station.

3. (Individual or small group activity) Create a bulletin board that shows all of the different ways that a salesman could show initiative and creativity. For example, new displays, different stocking methods, new methods of reaching customers, etc.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Poster board, construction paper.

2. Old magazines.

RESOURCES:

Conover, Hobart H., Milton K. Berlye, Sanford F. Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA, 1982, pp. 359-372, 134-135.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 381-382. 1980.

9.0 **COMPETENCY:** Demonstrates responsible work habits.

9.5 **TASK:** Adapts to changes in routine or unexpected situations.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a change in routine or a new situation,

EVALUATION: adapts to unexpected changes.

STANDARD: The student/employee will adapt to the changes by maintaining previous productivity level, positive attitude and cooperation with co-workers and supervisor.

STUDENT LEARNING EXPERIENCES:

1. List changes that would be likely to occur in a marketing entry level job.
2. List changes that would be likely to occur in the transition of full time student to full time employee.
3. Explain why people are resistant to change.
4. Describe techniques to cope with change in an effective manner.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Totally change your teaching style for a class period. Ask for feedback on how students felt and about their adjustment.
2. Lead a class discussion on the impact of change on modern workers. Include topics such as technological changes and the number of jobs which will become obsolete in student's lifetime.
3. Develop a case study featuring change of supervisor and managing style. Have students discuss case in small groups and come up with effective ways for workers to cope with change and maintain a positive work attitude.
4. Ask a business analyst to talk to the class about occupational changes they might expect in their lifetime.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Case studies on change.

RESOURCES:

Leonard, Karen K., ADJUSTING TO CHANGE, Human Relations, Lap #8, IDECC INC., The Ohio State University, Columbus, OH. 1980, Teacher and student copies.

Conover, Hobart H., Milton K. Berlye, Sanford F. Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA. pp.50-65. 1982.

Rieken, Jeri Lyn, Gail House. SUCCEEDING ON YOUR OWN, Harcourt Brace Jovanovich, Publishers, Orlando, FL. pp.85-86. 1986.

9.0 **COMPETENCY:** Demonstrates responsible work habits.

9.6 **TASK:** Checks or inspects results to ensure that accuracy is achieved.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given a task or series of tasks to complete,
EVALUATION:	checks or inspects results to ensure that errors are minimized and accuracy is achieved.
STANDARD:	The completed task will be checked for accuracy by one or all of the following: verifying source document/instructions, proofreading, or re-calculating.

STUDENT LEARNING EXPERIENCES:

1. Explain how checking results of an activity or task can save time.
2. List procedures for checking the accuracy of task or project.
3. Proofread and correct written documents.
4. Verify counts and calculations.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Lead a large group discussion on importance of checking quality and validity of own work.

2. Show film or introduce resource speaker on importance checking for errors and effect or errors. (See resources)

3. Use as a on-going project various DECA fundraising projects. Get students involved in checking incoming merchandise against invoices, auditing accounting records for fundraiser or do being book count against physical count.

4. Involve students in a local store physical inventory. Invite manager to classroom for training and explanation of importance or an accurate inventory and consequences if inaccurate.

5. Require students to keep an accurate wage and hour report for a paid job.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Telephone books, zipcode directories, etc.

2. Film or resource speaker.

3. Wage and hour report forms

RESOURCES:

FILM, THE MARVELOUS MOUSETRAP, (humorous, well done film on quality control, 1963)

10.0 **COMPETENCY:** Uses effective interpersonal skills.

10.1 **TASK:** Works cooperatively with co-workers and supervisors.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given a task or activity to complete in a group,
EVALUATION:	works cooperatively with co-workers and supervisors.
STANDARD:	Complete tasks within a stated timeframe and maintain a harmonious and pleasant work atmosphere, as observed by co-workers, supervisors, or instructors.

STUDENT LEARNING EXPERIENCES:

1. Define the word cooperation and explain how it affects group productivity both at work and school.
2. Describe characteristics of groups and the roles group members play.
3. Identify specific things one can do at work to create a cooperative atmosphere.
4. List specific things a supervisor looks for in cooperation.
5. Complete tasks within groups and evaluate the effectiveness of the group in accomplishing the task.

SUGGESTED INTRUCTIONAL TECHNIQUES:

1. Select two students to demonstrate the need to work cooperatively by having them come to the front of the room and perform the following. Two students are seated at a table but back to back and not able to see each other. Give each student 15 identical pieces of lego or blocks. Ask student #1 to begin building a design and describe it to student #2. The student must follow the directions of the design best he or she can and try to build the same design. After the demonstration, lead a class discussion on the need of clear communication as a foundation to working cooperatively.

2. Bring in a resource speaker from industry to speak on the need to work cooperatively to meet group goals. A good choice would be a department or personnel manager from a local department store. Ask them to talk on what happerns to productivity and personal promotions when people work cooperatively and non-cooperatively at a project.

3. Divide students into pairs and have them compete in accomplishing a task such as a 3 legged race (or something less physical..) where cooperation is a must to achieve a goal.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Lego blocks (at least 2 sets of 15).

RESOURCES:

Conover, Hobart H., Milton K. Berlye, Sanford F. Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA. pp. 66-75, 359-372. 1982.

Davis, Rodney, Kay B. Brown. REAL ESTATE, McGraw-Hill Book Company, pp. 46-48. 1979.

Rieken, Jeri Lyn, Gail House. SUCCEEDING ON YOUR OWN, Harcourt Brace Jovanovich, Publishers, Orlando, FL. pp. 85-86. 1986.

DECA Officer Workshop for Arizona, 1980, DECA LDI SUMMER LEADERSHIP CAMP, THE MOUNTAIN CLIMB

DECA Leadership Activity Guide, LDI, 1978, BUILDING THE LDI HOUSE

Leonard, Karen K. POSITIVE WORKING RELATIONSHIPS, Human Relations, lap #9, IDECC, INC., The Ohio State University, Columbus, OH. 1980.

10.0 **COMPETENCY:** Uses effective interpersonal skills.

10.2 **TASK:** Displays courtesy, tactfulness and patience.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given an unpleasant or trying situation,

EVALUATION: displays courtesy, tactfulness and patience in relationships with others.

STANDARD: Student shows no anger or impatience, maintains good eye contact and a pleasant facial expression, as observed by the supervisor or instructor.

STUDENT LEARNING EXPERIENCES:

1. Describe the terms courtesy, tactfulness and patience, the importance of each of the three in maintaining and progressing on a job.
2. Describe general techniques for demonstrating courtesy, tactfulness, and patience.
3. Demonstrate courtesy and patience in role playing situations.
4. Describe observed situations where others used courtesy, tactfulness, and patience and evaluate each situation.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Hold a large group discussion on the importance of tactfulness, courtesy and patience. Be sure to include both positive and negative examples of each. Discuss the results of both negative and positive human relations traits.

2. Divide students into small groups and give them a case problem on employee customer relations. Put adhesive backed labels on each students's forehead directing the others how to react to them. Examples would be: Be rude to me, listen to me, let me know I'm stupid, etc. Students should be asked to solve the case problem by reacting to each person according to their label. Give 10 minutes to discuss problem. Have students then guess their labels. A large group discussions should follow on how each felt and what effect it had on their participation in the project.

3. Instruct individual students to observe all incidents for a week of cues or messages received concerning positive and negative examples of tactfulness, courtesy, and patience. Have each student all incidents and write his or her emotional reaction to each incidents (both positive and negative). This should develop empathy and make students more aware of positive human relations.

4. Conduct a Toastmasters program in the classroom to provide better communications skills and develop skills in being courteous, tactful, and patient. This will be accomplished setting standards requiring students to listen to each other carefully and applaud one anothers efforts. Evaluators will learn to use tact in giving feedback on student speakers.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Room large enough to hold 6 circles of students.
2. Adhesive labels.
3. Representatives from TOASTMASTERS INTERNATIONAL.
4. Duplicate materials and rules for TOASTMASTER PROGRAM.
5. Lecturn and gavel.

RESOURCES:

Conover, Hobart H., Milton, K. Berlye, Sanford Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA. pp. 344-369. 1982.

Leonard, Karen K., PERSONAL TRAITS. Human Relations #10, IDDEC Ohio State University, Columbus, OH. 1981.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 335-338. 1980.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 14-22. 1986.

10.0 **COMPETENCY:** Uses effective interpersonal skills.

10.3 **TASK:** Controls emotions under demands of time, pressure, or opposition.

PERFORMANCE OBJECTIVE:

CONDITION: Given a task or crisis situation,

EVALUATION: controls emotions and maintain effective performance under demands of time, pressure or opposition.

STANDARD: Completes the task without losing self control as observed by the superviosr and/or instructor.

STUDENT LEARNING EXPERIENCES:

1. Explain the meaning of the term "self control".
2. Describe techniques for developing better self control.
3. Identify specific self control techniques which can be used to solve problems created by lack of time.
4. Identify specific self control techniques which can be used to solve problems created by pressure or opposition.
5. List the steps one would take to extinguish a self control problem.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Give a large group presentation on understanding and achieving self-control. Include techniques for identifying and improving self control.

2. Organize students into small groups. Ask each group to select a leader and recorder. Each group shold work together to develop a list of 10 common behavior problems which could be helped through better self control. Have students draw on their own experiences and observed experiences of others. Give students 20 minutes to make list and then have recorder report finding to class. Appoint one student to compile a master list for entire class.

3. Organize students into small groups. Give each group of studens a stack of blocks to stack. Each student must put one hand behind his or her back. At teacher signal each group must collectively stack as many of the blocks as possible in a straight column. The group with the highest stack wins the round. Each round should be no more than 1 minute. Each time period should show an increase production.

   As a debriefing, discuss what happened to manual dexterity, voice loudness, types of directives, etc. as time and rounds continued. Did competition cause lack of self cntrol in any area? (if available, video record the groups in action and playback at debriefing time)

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Enough wooden blocks for each group to have at least 30.

2. Video recorder and camera and monitor

RESOURCES:

Leonard, Karen K., SELF CONTROL, Human Relations, #18, IDECC, INC., The Ohio State University, Columbus, OH. 1981.

Conover, Hobart H., Milton K., Berlye, Sanford Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA. pp. 66-75. 1982.

10.0 **COMPETENCY:** Uses effective interpersonal skills.

10.4 **TASK:** Recognizes the accomplishments of others.

PERFORMANCE OBJECTIVES:

CONDITIONS: Given an achievement by another member of the class or work community,

EVALUATION: recognize the accomplishments of others.

STANDARD: The verbal or written message describes the specific achievement, in a positive and articulate manner.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of recognizing the accomplishments of others.
2. Describe techniques businesses use to recognize the accomplishments of employees.
3. List the accomplishments of a specific person.
4. Practice recognizing the accomplishments of others by observing co-worker/classmate, looking for achievement and verbally giving them credit or praise.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss the importance of recognizing the accomplishments of others and tell how it positively effects others. Explain empathy and how what makes us feel good probably is true for others.

2. Have students draw names for "secret pals" for a 9 week period. Provide space for students to have a cubby hole or maildrop where notes can be sent. Ask each student to observe positive things and accomplishments for the 9 week period. Student should also keep log to turn in for monitoring.

3. Choose a "Student of the Month" using the criteria of having students list accomplishments of classmates. Article can then be written and submetted to school newspaper or display can be built in front window giving credit to student and accomplishments.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Traveling trophy for "Student of the Month".

2. Multi-tray file or provision for mail envelopes.

RESOURCES:

Conover, Hobart H., Milton K. Berlye, Sanford Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA. pp. 259-272. 1982.

11.0 **COMPETENCY:** Demonstrates ethical behavior.

11.1 **TASK:** Demonstrates honesty and integrity.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a position of responsibility,

EVALUATION: demonstrates honesty and integrity.

STANDARD: Follow the expressed and implied policies and over a specified time period.

STUDENT LEARNING EXPERIENCES:

1. Define and describe the difference between "honesty", "integrity", and "ethics".
2. List the ways one can be dishonest other than with money.
3. Describe the effect on profit that dishonesty by employees has on businesses.
4. Identify specific guidelines for honest and ethical behavior.
5. Evaluate specific situations for ethical considerations, and identify alternative actions.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Set the framework for the discussion by finding out students current knowledge and values in relationship to honesty. Brainstorm on blackboard all the things that honesty means on a job other than be honest with money. Ask students to expand on the things brought up and then set hypothesis for topic. Students will do better with this topic if discussion rather than lecture oriented.

2. Fundraisers for DECA become a good tool for teaching both honesty and ethics. Discuss the ways a student could be dishonest and the effect on the entire group.

3. Develop case studies which test integrity in the marketplace. Work either independently or in small groups.

4. Set up courtroom type atmosphere using "you be the judge" type of presentation. Give case studies to sudents and have them make the decisions's on how to decide proper ethics. Use problem solving techniques listed above to make decision.

5. Obtain resource speaker to talk on White Collar crime and the trend toward computer theft. Ask topic be centered around all the data banks being maintained and "ethics" and potential for misuse.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Case studies on ethics

RESOURCES:

Conover, Hobart H., Milton K. Berlye, Sanford Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA, 1982, pp. 37-41, 48-51. 1982.

Davis, Rodney E., Kay B. Brown. REAL ESTATE, McGraw-Hill Book Company, New York, NY. p.48. 1979.

Mathisen, Marilyn, APPAREL & ACCESSORIES, McGraw-Hill Book Company, New York, NY. pp. 18-19. 1979.

Sasse, Connie R., PERSON TO PERSON, Glencoe Publishing Company, Peoria, IL. pp. 60-79. 1981.

Leonard, Karen K., HONESTY AND INTEGRITY, Human Relations #19, IDECC, INC., The Ohio State University, Columbus, OH. 1981.

11.0 COMPETENCY: Demonstrates ethical behavior.

11.2 TASK: Maintains confidentiality of data or information.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given access to confidential information,

EVALUATION: maintains confidentiality of data or information.

STANDARD: The confidential information will not be obtained nor given to anyone unauthorized to have it, as observed by the supervisor or instructor.

STUDENT LEARNING EXPERIENCES:

1. Define the term "confidential", and explain how it relates to business information.
2. Given a list of business information, differentiate which are and are not confidential.
3. Develop a list of items that should be kept confidential in a specific job or duty.
4. Describe the consequences of not keeping business data confidential.
5. Describe the relationship between "integrity", "ethics", and "confidential information".

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Introduce the topic of confidential informaton by playing the game of "Gossip". Discuss the atmoshpere in which gossip exists and the temptations involved to tell more than you should. Draw from the group a list of things which should be labeled confidential both at work, school and home.
2. Discuss case studies highlighting misuse of confidential information.
3. Obtain a resource person to discuss safeguards built into computer programs to keep files confidential and out of the wrong hands.
4. Lead a discussion on business ethics as it relates to keeping records of customers, co-workers and supervisors.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Case studies on use and misuse of confidential information.

RESOURCES:

Conover, Hobart, Milton K. Berlye, Sanford Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA. pp. 330-343. 1892.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 223-227. 1986.

Smith, William, FOOD SERVICES, McGraw-Hill Book Company, New York, NY. p. 25. 1979.

12.0 **COMPETENCY:** Demonstrates planning and organizational skills.

12.1 **TASK:** Sets priorities and uses time to meet job requirements.

PERFORMANCE OBJECTIVE:

CONDITION: Given a series of personal, school and work responsibilities,

EVALUATION: sets priorities and use time to meet the requirements.

STANDARD: Manage time effectively over a specified period.

STUDENT LEARNING EXPERIENCES:

1. Explain the goals of time management and how effectively managing time can help a person to achieve his/her personal goals.
2. Describe the techniques for effectively managing time.
3. Develop and priortize a list of personal, school and work responsibilities.
4. Evaluate personal time use and develop improvement plans.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Lead a class discussion on techniques for successful time management. Include goal setting, prioritizing, and scheduling of activities.

2. Divide students into small groups of no more than 4. Choose a leader and recorder. Give group prepared project on time management. Make up a list of committments and opportunities for a person. Include the person's short and long term goals. Request that all activities be scheduled unless they can justify not scheduling. Students should prioritize all items according to the must do, should do, and nice to do system. Have students report back to total group the results of their scheduling. (see resource #2)

3. Students could keep a journal for a week observing how they spent their time. No attempt would be made to plan or schedule time for this time period. After the class discussion on time management, ask students to plan and schedule their time. Students should then compare the results of their activity and productivity.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Notebook to keep journal in.

2. Duplicated materials (#2).

3. Goals and short biography of persons interest.

4. List of committments & activities to be scheduled.

5. Time chart including hours and days for 1 week to be filled in.

RESOURCES:

Leonard, Karen K., ORDERLY AND SYSTEMATIC BEHAVIOR, Human Relations, Lap #4, IDECC, The Ohio State University, Columbus, OH. 1980, Student and teacher copies.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 198-202. 1986.

12.0 **COMPETENCY:** Demonstrates planning and organizational skills.

12.2 **TASK:** Ensures that specific time limits are met.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a set of tasks or activities to complete,

EVALUATION: ensures that specific time limits are met.

STANDARD: Complete activies within set time limits and maintaining quality.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of timelines and the potential consequences of deadlines which are not met.
2. Describe the importance of planning and prioritizing to accomplish tasks, especially for longterm or complex tasks.
3. Describe project planning techniques, such as PERT and GANTT.
4. Develop PERT and GANTT charts for a specific project.
5. Describe processes used to complete projects within timelines.
6. Demonstrate completion of tasks within a fixed time frame.

SUGGESTED INTRUCTIONAL TECHNIQUES:

1. Discuss the benefits of organizing and following through on a plan of action. Stress the importance of planning ahead for deadlines. Give techniques on setting priorities and still scheduling leisure time.

2. Plan a schedule of work for your local DECA chapter. Assign each student a specific task, responsibility or activity to chair. Have each student build a time frame and checkpoint system for insuring each activity or responsibility in completed in quality condition prior to time frame.

3. Assign students to work in small groups planning a major DECA club function. Good assignments for this would be Employer Employee Banquet, Fund raiser, Civic Consciousness or Toastmasters Project. Each group shold take a different topic and set objectives, timelines and checkpoints. A spokesman should report to the class and then whole group can discuss how realistic goals are, possible stumbling blocks in completing and deciding on which student will take which responsibility.

4. From the assignment in #3, student should plan his or her time needed to successfully complete assignment in quality condition prior to timeline. Show instructor completed plan of action.

INSTRUCTIONAL EQUIPMENT, MATERIAL, AND SUPPLIES:

1. Duplicated sheets for daily organization.

2. Duplicated calendars for planning.

3. National DECA projects.

4. Plan of action forms.

RESOURCES:

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. p. 201. 1986.

Leonard, Karen K., ORDERLY AND SYSTEMATIC BEHAVIOR, Human Relations #4, IDECC, INC. The Ohio State University, Columbus, OH. 1980.

12.0 **COMPETENCY:** Demonstrates planning and organizational skills.

12.3 **TASK:** Plans and organizes the work of subordinates in a logical and organized manner.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of tasks and workers,

EVALUATION: plans and organizes work of subordinates in a logical and systematic manner.

STANDARD: Workers are assigned to complete all tasks on list, and the tasks assigned comprise a logical grouping for each worker.

STUDENT LEARNING EXPERIENCES:

1. Describe delegation and the importance of delegation for those who supervise others.
2. Decide what tasks must be completed to complete a specific project.
3. Determine the order in which the tasks should be completed.
4. Delegate tasks to those working under your leadership by matching talents with tasks.
5. Assign timelines to sub-ordinates and develop checkpoints into task completion.
6. Follow-up to encourage meeting time schedules and completeness.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Introduce topic to whole class with discussion of "if I were the boss in my department, I would" . . . as it applies to delegation, planning and organizing department responsibilities. Elicit student responses on the benefits of being well organized and methods and tips for being more organized.

2. The DECA club is one of the best tools we have to teach the task of planning and organizing work of subordinates, as all students do not progress to that level of work. In the club plan of work, make sure each student is in charge of a segment on one of the club projects. As chairman, the student can make a plan for completion for his her assignment.

3. After adequate instruction on planning, organizing, and delegating, assign each student to make up a list of all the duties and responsibilities of the department in which they work. Ask them to make a sample job description, weekly schedule for all employees and task assignment for his/her department or store.

INSTRUCTIONAL EQUIPMENT, MATERIAL, AND SUPPLIES:

1. A list of projects for completion.

RESOURCES:

Conover, Hobart, Milton K. Berlye, Sanford Gordon. BUSINESS DYNAMICS, Glencoe Publishing Company, Encino, CA. pp. 42-47. 1982.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 209-222. 1986.

IDECC, The Ohio State University, Columbus, OH. 1980, Lap #4, ORDERLY AND SYSTEMATIC BEHAVIOR.

ECONOMICS

13.0 **COMPETENCY:** Describes and applies economic principles.

13.1 **TASK:** Describes how economic resources are allocated in a free market economy.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given information on a specific community,
EVALUATION:	describes how economic resources are allocated in a free market economy.
STANDARD:	The description shall include wants and needs, goods and services, types of resources, scarcity, opportunity costs, and basic choices that an economic system must answer.

STUDENT LEARNING EXPERIENCES:

1. Define economics and economic resources.
2. Explain the differences between wants and needs
3. Define goods and services.
4. Define scarcity and explain some of its causes.
5. Describe what is meant by opportunity cost and trade offs.
6. Identify the three basic choices that must be made in every economic system.
7. Describe free market economics and how economic choices are made in a free market.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Show a film depicting allocation of resources (see resources).

2. Play a game simulating opportunity costs and scarcity (see resources).

3. Explain to the class the basic terms associated with resource allocation. Have student give examples of the trade-offs.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Film projector; game material (see resource #2).

RESOURCES:

Mason, Ralph, Patricia Rath, Stewert Husted. MARKETING PRACTICES AND PRINCIPLES (text). McGraw-Hill Book Company, New York, NY. pp. 29-937. 1986.

Peterson H. Craig, and W. Chris Lewis, FREE ENTERPRISE TODAY (text). South-Western Publishing Company, Cincinnati, OH. pp. 16-32. 1985.

MASTER CURRICULUM GUIDE IN ECONOMICS - TEACHING STRATEGIES - HIGH SCHOOL ECONOMICS COURSES (lessons 1,2,3,4,13 - Games and simulations). New York, NY.

MRS. PEABODY'S BEACH; RESOURCES AND WORLD TRADE Arizona Council on Economic Education, Tucson, AZ. (film).

13.0 **COMPETENCY:** Describes and applies economic principles.

13.2 **TASK:** Describes the basic concepts of the Free Enterprise System.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the description of a specific marketing business.

EVALUATION: describes the basic concepts of the Free Enterprise System.

STANDARD: The description must include a description of profit, freedom of choice, and the right to own property.

STUDENT LEARNING EXPERIENCES:

1. Describe the three main types of economic systems: traditional, command, and market systems.
2. Identify the basic components of a traditional economy.
3. Identify the basic components of a command economy.
4. Describe the basic components of a Free Enterprise System: profit, freedom of choice, and right to own property.
5. Differentiate between socialism, communism, and capitalism.
6. Identify Free Enterprise components of the local business community.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Show students a map of the world(globe, etc.), point to various countries and have students select what type of economic system exists there.

2. Assign student groups to research particular countries. Have them report not only on their economic system, but other characteristics such as labor force, industry, money, culture, society, etc.

3. Have each student create a partial map of the world and label the existing economic system in that particular part.

4. Have each student select a local business and interview the owner as to why he/she is in business. Report to the class.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Maps, globes.

2. Library services and resources.

3. Poster board and colored pencils/pen.

RESOURCES:

Clayton, & Brown ECONOMICS - PRINCIPLES AND PRACTICES. Glencoe Publishing Company, Encino, CA. pp. 79-97.

Mason, Ralph, Patricia Rath and Stewert Husted. MARKETING PRINCIPLES AND PRACTICES, (text). McGraw-Hill Book, Company, New York, NY. pp. 20-28. 1986.

MARKET ECONOMY OF THE U.S. 16mm film, Arizona Council on Economic Education, Tucson, AZ.

13.0 **COMPETENCY:** Describes and applies economic principles.

13.3 **TASK:** Describes utility as it relates to production and marketing.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product/service,

EVALUATION: described the concept of utility as it relates to the production and marketing of a good/service.

STANDARD: Description will include the four forms of utility as they relate to the given product/service.

STUDENT LEARNING EXPERIENCES:

1. Explain the concept of "value added" and how utility is created.
2. Describe time utility and marketing situations which illustrate the value of time utility.
3. Describe place utility and marketing situations which illustrate the value of place utility.
4. Describe possession utility and marketing situations which illustrate possession utility.
5. Describe form utility and marketing situations which illustrate the value of form utility.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present similar products and explain the four utilities that are related to them.

2. Divide in small groups; have the students brainstorm for unique product utilities and make a presentation to the class.

3. Have the individual choose a product or service; then have the student make a poster showing the utilities and the production/marketing activities associated with that utility.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Tangible products

2. Poster board and pens.

RESOURCES:

Clayton and Brown. ECONOMICS: PRINCIPLES AND PRACTICES, Glencoe Publishing Company, Encino, CA. pp.5-25.

Mason, Ralph, Patricia Rath, and Stewert Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. pp. 38-46. 1986.

AMERICAN ENTERPRISE SERIES, Phillips Petroleum Co., Video or 16 mm film, Arizona Council on Economic Education, Tucson, AZ.

13.4 **TASK:** Describes the relationship of supply, and demand, to price and production.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given information on a specific product or service,

EVALUATION: describes the relationship of supply and demand to price and production.

STANDARD: The description will include market behavior, supply and demand, and market price.

STUDENT LEARNING EXPERIENCES:

1. Describe the relationship between price and demand for a product or service.
2. Construct and describe a demand schedule shows.
3. Describe the relationship between price and the supply of a product or service.
4. Construct and describe a supply schedule.
5. Describe how market prices are determined.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Show the class a demand and supply schedule. Point out how certian events affect the schedules.

2. Have small groups choose one product/service or local business. Interview that business owner/manager and determine their pricing methods, items for sale, problems that affec business.

3. Provide a case study involving supply and demand (see resources).

4. Utilize a game showing supply and demand (see resources).

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Overhead projector, materials for game (reference below).

2. Poster Board or similar.

RESOURCES:

A MARKET IN WHEAT, Master Curriculum Guide in Economics: Teaching Strategies for High School Economics Courses, 1985.

JEANS FACTORY, MARKETPLACE, Arizona Council on Economic Education. (computer simulations)

MARKET CLEARING PRICE, Arizona Council on Economic Education, Tucson, AZ. (film).

13.0 **COMPETENCY:** Describes and applies economic principles.

13.5 **TASK:** Describes the role of competition in marketing.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given similar products, service(s) or businesses,

EVALUATION: describes the role of competition in marketing.

STANDARD: The description will include the effect on the quality, availability, price, and comparative value of the specific products or services.

STUDENT LEARNING EXPERIENCES:

1. Define competition and differential advantage.
2. Describe how businesses attempt to compete with each other.
3. Describe the advantages to the consumer which are created by competitive actions of businesses.
4. Describe how competition affects specific marketing decisions.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present various products that have new features and benefits for consumers. Have class give old and new features and benefits.

2. In small groups, trace, the historice path of several products/services and how it has changed from its original to its newest form or use.

3. Using a particular product/service, have the student draw a flowchart of a product/service from its original form or use to its present status.

INSTRUCTIONAL EQUIPMENT MATERIAL AND SUPPLIES:

1. Several popular and similar related products; similar product information guide.

2. A list of several popular and similar businesses.

RESOURCES:

Stull William A. and Roger W. Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. pp. 23-48. 1986.

MARKET IN MOTION, 16 mm film, Arizona Council on Economic Education, Tucson, AZ.

Mason, Ralph, Patricia Rath & Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, pp. 148-157. 1986.

13.0 **COMPETENCY:** Describes and applies economic principles.

13.6 **TASK:** Describes the nature of international trade.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given competing products produced in the U.S. and another country,

EVALUATION: describes the nature of international trade.

STANDARD: The explanation will include absolute advantage, comparative advantage, imports, exports, balance of trade, tariffs, balance of payments, and exchange rate.

STUDENT LEARNING EXPERIENCES:

1. Define what comparative advantage and absolute advantage are.
2. Describe how nations can benefit by trading with each other.
3. List the main imports and exports of the U.S.
4. Define what is meant by balance of trade and balance of payments.
5. Explain the difference between fixed and floating exchange rates.
6. Discuss the purpose and effect of tariffs.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Ask a speaker from a securities brokerage to come in and talk on money valuation and it's affect on the market.
2. Play a simulation game as referenced (see resources).
3. Have student groups make a report on a particular country, noting culture, economic system, political system, comparative and absolute advantages.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Game materials.
2. Library resources.

RESOURCES:

Peterson H. Craig and W. Chris Lewis. FREE ENTERPRISE TODAY, (text). South-Western Publishing Company, Cincinnati, OH. pp. 434-452

Federal Reserve Bank of San Francisco Instructional Materials, Public Information Department., 101 Market Street, San Francisco, CA 94105 (supplemental info).

MASTER CURRICULUM GUIDE IN ECONOMICS - TEACHING STRATEGIES HIGH SCHOOL ECONOMIC COURSES. Joint council on Economic Education, 2 Park Avenue, New York, N.Y. 10016 (games 20, 21, 22).

13.0 **COMPETENCY:** Describes and applies economic principles.

13.7 **TASK:** Describes components of profit and relationship to business success.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the selling price of a particular product or service.

EVALUATION: describes the components of profit and their relationship to business success.

STANDARD: The description should include production cost, expenses, profit, supply and demand and return on investment.

STUDENT LEARNING EXPERIENCES:

1. Define mark-up, cost, selling price, gross profit, net profit, and return on investment.
2. Describe the factors involved in determining the price of a product or service.
3. Describe how supply and demand affects the price of a product or service.
4. Differentiate fixed and variable expenses and describe the impact of each on profitability.
5. Describe return on investment and the importance of profit for long term business success.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Create a survey and ask students what they would be willing to pay for a particular product. Tally the results and see if the selling price produces a profit.
2. Have students complete a Case Study of a Business making a pricing decision.
3. Have students investigate a business and what is their pricing method.
4. Have groups compete against each other using the computer simulations (see resources below).

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Computer hardware.
2. Prices of popular products/services.

RESOURCES:

Mason, Ralph, Patricia Rath,and Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company. New York, NY. pp. 192-215. 1986.

Stull, William A. & Roger W. Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. 304-326. 1986.

JEANS FACTORY, LEMONADE STAND, MARKETPLACE, - Computer Simulations - Arizona Council on Economic Education Tucson, AZ.

MASTER CURRICULUM GUIDE IN ECONOMICS - TEACHING STRATEGIES, HIGH SCHOOL ECONOMICS COURSES, 2 Park Avenue, New York, NY 10016 (lessons 3, 5-9, 11, 22-games).

13.0 **COMPETENCY:** Describes and applies economic principles.

13.8 **TASK:** Describes how economic concepts influence marketing decisions.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given information on current economic conditions and issues,

EVALUATION: describes how economic concepts influence marketing decisions

STANDARD: The description will include an analysis of the marketing implications of each issue.

STUDENT LEARNING EXPERIENCES:

1. Define and describe the concepts of inflation and deflation.
2. Describe the role of interest rates in marketing goods and services.
3. Describe current national and international conditions.
4. Describe a specific current industry which is involved in change (growth or decline).

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Conduct a survey among students to see what kind of buying habits/patterns. Compare your results with a nationwide trend.
2. Visit a local business. Find out what problems this owner is faced with and how he deals with them.
3. Have each student pick an industry and write a brief summary on the trends of that particular industry.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Mason, Ralph, Patricia Rath, and Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, "Reducing Marketing Risks", McGraw-Hill Book Company, New York, NY. pp. 387-394. 1986.

"IS ANYBODY LISTENING"? Arizona Council on Economic Education, Tucson, AZ. (film).

PACE - Program for Acquiring Competence in Enterpreneurship "Understanding the Nature of Small Business", Level I,II The National Center for Research in Vocational Education, Ohio State University, Columbus, Ohio.

MARKETING FOUNDATIONS

14.0 **COMPETENCY:** Describes and applies basic marketing principles.

14.1 **TASK:** Defines and describes the marketing functions.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific product,

EVALUATION: defines and describes the marketing functions.

STANDARD: The description should describe how each function is performed and which marketing institution performs the function.

STUDENT LEARNING EXPERIENCES:

1. Define and describe each of the following:
    a. buying
    b. selling
    c. transporting
    d. storing
    e. financing
    f. informing
    g. risk-bearing
    h. standardizing and grading
2. Name and describe the primary marketing institutions.
3. Describe how marketing functions may be performed by different types of institutions.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide a Case Problem on the utilization of the marketing functions.

2. Invite a local businessperson to explain the functions and how they are performed on a daily basis.

3. Have each student investigate a single business and match the activities of that business with the functions. Have the results reported in class.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Case Problem.

RESOURCES:

Mason, Ralph, Patricia Rath, and Stewart Husted. MARKETING PRACTICES & PRINCIPLES. McGraw-Hill Book Company, pp. 38-48. 1986.

Stull, William and Roger Hutt. MARKETING: AN INTRODUCTION. South-Western Publishing Company, Cincinnati, OH. pp. 23-48. 1986.

THE NEW BREED; Arizona Council on Economic Education at University of Arizona, Tucson, AZ (film).

14.0 **COMPETENCY:** Describes and applies basic marketing principles.

14.2 **TASK:** Defines and applies the term 'marketing concept'.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product/service, and/or business,

EVALUATION: defines and applies the term marketing concept.

STANDARD: The definition should describe how the given product/service fullfills needs of customers at a profit.

STUDENT LEARNING EXPERIENCES:

1. Define the term marketing concept.
2. Describe the three components of the marketing concept:
   a. customer needs/wants
   b. business functions
   c. profit
3. Differentiate between marketing and selling.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Start a project simulating a business venture. Have the students pick a product/service, and then implement the production, finance and marketing activities.
2. Have a speaker from a unique business locally to talk about what needs/wants his/her business is fullfilling.
3. Have students research ideas, innovations, patents, trademarks, etc. Report what needs/wants were satisfied based on these findings.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Mason, Ralph, Patricia Rath and Stewart Husted. MARKETING PRACTICES & PRINCIPLES. McGraw-Hill Book Company, New York, NY. pp. 38-48. 1986.

Stull, William and Roger W. Hutt. MARKETING AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. pp. 2-22. 1986.

James Koeninger and Thomas Hephner, JEFFREY'S DEPT. STORE - A retailing simulation, Gregg/McGraw Hill Book Company, New York, NY. 1981 (simulation).

MANAGEMENT FOUNDATIONS

15.0 **COMPETENCY:** Identifies entrepreneurial opportunities.

15.1 **TASK:** Identifies major factors contributing to success of a business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given case histories of one or more marketing businesses,

EVALUATION: identifies the major factors contributing to the success or failure of a business.

STANDARD: Factors identified agree with those determined by instructor or case problem author.

STUDENT LEARNING EXPERIENCES:

1. Identify causes of business failure as described by Dun and Bradstreet.
2. Breakdown and catagorize the elements of the leading cause of business failures - management.
3. Using categories listed in item 2 above, identify your areas of weaknesses and formulate a personal plan to gain experience in areas of deficiency.
4. Examine failure rates by (a) types of businesses; (b) years of age in business; (c) chart of current liabilities.
5. Identify four symptoms of business failure.
6. List and describe characteristics of a successful entrepreneur.
7. Analyze business factors necessary to make a business a success and summarize from your finding how your business will be prepared in those areas. (Use analysis web.)

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present students with report from Dun and Bradstreet on business failure rates and causes. Assign groups to analyze report for (a) failure rates by types of businesses; (b) years of age in business; (c) chart of account; (d) top seven causes of failure; (e) symptoms of business failure; (f) success in business; (g) the 5 D's for successful entrepreneurs.

2. Have students prepare a personal plan of action for areas of management in which they are deficient.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

SPECIALIZED SMALL BUSINESS MANAGEMENT FOR TRADE, INDUSTRIAL, AND TECHNICAL AREAS, Vol. I, The Southeast Network for Curriculum Coordination, Mississippi State, MS. pp. 45-50. (Dunn and Bradstreet report; causes of business failures catagorized; symptoms of business failure; necessities for success in business.

Fallek, Max, HOW TO SET UP YOUR OWN SMALL BUSINESS. Vol. I, American Institute of Small Business, Minneapolis, MN. p. 1.9 (Why do businesses fail, five D's of a successful entrepreneur.) 1987.

15.0 COMPETENCY: Identifies entrepreneurial opportunities.

15.2 TASK: Identifies the steps in finding a business to buy.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a proposed new business.

EVALUATION: identifies the steps in finding a business to buy.

STANDARD: The developed list will be evaluated on the basis of a checklist provided by the instructor.

STUDENT LEARNING EXPERIENCES:

1. List the advantages and disadvantages of buying an existing business.
2. Describe the concept of good will and explain how it affects the purchase price of a business.
3. Describe the criteria for selecting an existing business to purchase.
4. Evaluate alternative businesses on their potential for success.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Use story grid to illustrate the creative thinking process in finding potential business ideas. (Referenced below).

2. Group students for this activity: Think of all the possible business opportunities for which your past vocational experiences (jobs, school classes) would provide you experience. Encourage students not to limit their list because of other factors - such as capital, location, etc.

3. Individually, ask students to group/classify all the possible business opportunities that skills, hobbies, and personal interests would provide experience.

4. Have students compare the two lists of business ideas to see if there are any businesses on either list that combine interests/experience. Discuss that this is one method now being used to brainstorm businesses they could start based on their interest/skills/hobbies and work experience.

5. Arrange for a guest speaker from the City Planning Department to discuss the anticipated growth changes within the city.

6. Prepare a chart as a handout that students can use to list the advantages and disadvantages of the three processes to be explored in opening a business.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Handouts - Chart for listing advantages and disadvantages of the three processes to starting a business.

RESOURCES:

Hutt, Roger W., CREATING A NEW ENTERPRISE, South-Western Publishing Company, Cincinnati, OH. pp. 24-31. 1982.

Bellanca, Fogarty, Opeka, PATTERNS FOR THINKING. Illinois Renewal Institute, (Story Grid p. 27, Brainstorming p. 86.) 1986.

Fallek, Max, HOW TO SET UP YOUR OWN SMALL BUSINESS, Vol. 1, Unit 1. Minneapolis, MN. 1987.

Fischer, Lisa M., et al., RISKS AND REWARDS OF ENTREPRENEURSHIP, The National Center for Research in Vocational Education, Columbus, OH. pp. 21-26. 1986.

PACE Ohio State University, Columbus OH. Unit 1, Level 2. 1982.

15.0 **COMPETENCY:** Identifies entrepreneurial opportunities.

15.3 **TASK:** Identifies legal issues to be checked before buying a business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a proposed new business,

EVALUATION: identifies the legal issues to be checked before buying a business.

STANDARD: The legal issues will include general considerations, buying the company vs. buying the assets, purchase price adjustments, contingency clause, closing documents, and legal assistance.

STUDENT LEARNING EXPERIENCES:

1. List the advantages of buying an existing business.
2. List the advantages and disadvantages of buying the company vs. buying the assets.
3. Identify the options for purchase price adjustments.
4. Identify the four criteria for a contract to be legal and binding.
5. Discuss the importance of a contigency clause in the purchase contract.
6. List the closing documents that transfer ownership of the business.
7. Describe the importance of retaining the services of a lawyer when buying an existing business.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a lawyer or a banker to discuss the contract, contingency clause, and closing documents.

2. Invite a business owner who has purchased an existing business to discuss buying the company vs. buying the assets, and purchase price adjustments. Alternate speaker-accounting teacher at the local school.

3. Provide a matching exercise for students identifying vocabulary for agency and contract law.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Church, Olive D., ENTREPRENEURSHIP: STEP-BY-STEP. J. Weston Walch, Publisher, Portland, ME. pg. 27. Matching exercise: Agency and Contract Law. 1986.

Fallek, Max, HOW TO SET UP YOUR OWN SMALL BUSINESS, Volume I. American Institute of Small Business, Minneapolis, MN. pp. 6.23-6.28. 1987.

SPECIALIZED SMALL BUSINESS MGMT. FOR TRADE, INDUSTRIAL AND TECHNICAL AREAS, Volume I, The SouthEast Network for Curriculum Coordination, Mississippi State, MS. pp. 50-53.

15.0 **COMPETENCY:** Identifies entrepreneurial opportunities.

15.4 **TASK:** Identifies franchise opportunities for a new business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a proposed type of business,

EVALUATION: identifies franchise opportunities for a new business.

STANDARD: The review will provide information on various types of franchise operations detailing what is expected of the franchise and what the franchise operation can offer.

STUDENT LEARNING EXPERIENCES:

1. Explain the basic principles of a franchise.
2. Identify examples of franchises.
3. Idenfify the factors that influence the choice of franchise ownership.
5. Describe a specific franchise agreement, including advantages/disadvantages, financial obligations, assistance and service provided by franchisor.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Arrange interviews with individuals involved in a variety of franchise operations. Students are to ask the franchisee to discuss financial cost, services and assistance provided and opportunities.

2. Have students review the publicaton FRANCHISE COMPANY DATA for information on various types of franchise operations.

3. Arrange for a panel of franchisee business owners to discuss with the class the opportunites in franchise operations.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Church, Olive D., ENTEPRENEURSHIP: STEP-BY-STEP. J. Weston Walch Publisher, Portland, ME. p. 11. (Student activity for community survey for franchises). 1986.

FRANCHISE ANNUAL, Info Press, 736 Center Street, Lewiston, NY. (cost $15.00)

FRANCHISE COMPANY DATA, can be obtained free from Sales and Distribution, U.S. Dept. of Commerce, Washington, D.C. 20230

FRANCHISE OPPORTUNITY HANDBOOK, number 003-008-00191-2, published by Dept. of Commerce, Government Printing Office, Supt. of Documents, Washington, D.C. 20402 (Cost $7.00)

PACE, The National Center for Research in Vocational Education, Columbus, OH. Levels 1 and 2, Units 5. 1983.

15.5 **TASK:** Identifies the basic ingredients of a legal business contract.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given a proposed contractual arrangement,
EVALUATION:	identifies the basic ingredients of a legal business contract.
STANDARD:	The basic ingredients of a legal contract should include: agreement, consideration; contractual capacity, legality, reality of consent.

STUDENT LEARNING EXPERIENCES:

1. Define the word "contract."
2. Identify the conditions that call for a written contract.
3. Name and describe the essential components of a legal contract.
4. Describe the situations in which legal assistance should be obtained.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Alone or with a partner, have students match contract terms with situations.
2. Have each student prepare an outline that itemizes the items they would want in a contract. Students should assume that they are purchasing an item that costs $500 for their business.
3. Group students and have them work together to negotiate a contract. Use the outline prepared in item #2 as discussion point. Students should evaluate each other to determine if a contract has been made.
4. Provide case studies for students to evaluate for components of contract.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

RESOURCES:

Church, Olive D., ENTERPRENEURSHIP: STEP-BY-STEP, J. Weston Walch Publisher, Portland, ME. p. 27. (matching exercise). 1986.

PACE, level 1, Unit 9 (case studies).

SMALL BUSINESS MANAGEMENT, Vol. 1, The Southeast Network of Curriculum Coordination, Part II, pp. 10-12. (case studies).

16.0 **COMPETENCY:** Develops a business operation plan.

16.1 **TASK:** Selects an appropriate form of business ownership.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific business,

EVALUATION: selects an appropriate form of business ownership.

STANDARD: The selection should include the advantages and disadvantages of the legal form chosen.

STUDENT LEARNING EXPERIENCES:

1. Describe the three basic forms of business enterprise-proprietorship, partnership, corporation-and list the advantages and disadvantages each form can provide.
2. Compare the legal cost and taxes of starting a business for each of the three basic forms of business enterprise.
3. Compare the management for each of the three forms.
4. Explain the implications of obtaining capital based on the type of ownership.
5. List the requirements in your community for forming each of the three basic forms.
6. Identify the decision factors affecting the selection of an appropriate form of business ownership.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have each student divide a sheet of paper into thirds. Compare the advantages and disadvantages for each of the three basic forms of ownership.
2. Have students interview a business person with the same form of organization that they are considering for their business. Determine why the owner selected one form over another.
3. Ask a panel of three business owners-one representing each of the basic organization forms - to share with class their reasons for choosing a particular form of business.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Bologh, Judy, et al., BEYOND A DREAM, Ohio State University, Columbus, OH. pp. 122-124. 1985.

Hutt, Roger W., CREATING A NEW ENTERPRISE, South-Western Publishing Company, Palo Alto, CA., pp. 63-75. 1982.

Felek, Max, HOW TO SET UP YOUR OWN BUSINESS, Vol. 1, Amer. Institute of Small Business, Minneapolis, MN. pp. 6.10-6.16. 1987.

Nelson, Robert E., OWNING AND OPERATING A SMALL BUSINESS, Illinois Department of Education, pp. 37-40. 1976.

Rowe, Kenneth L., and Roger W. Hutt, PREPARING FOR ENTREPRENEURSHIP, Arizona Department of Education, Phoenix, AZ. pp. 22-48. 1979.

SPECIALIZED SMALL BUSINESS MANAGEMENT FOR TRADE, INDUSTRIAL AND TECHNICAL Areas, Vol. 1, The Southeast Network for Curriculum Coordination, Mississippi State, MS. pp. 63-65.

16.0 **COMPETENCY:** Develops a business operation plan.

16.2 **TASK:** Evaluates a business plan.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a "checklist" for a business plan,

EVALUATION: evaluates a business plan.

STANDARD: The analysis follows the procedures of the designated checklist and accurately assesses the business plan.

STUDENT LEARINING EXPERIENCES:

1. Describe the expected components of a business plan.
2. Describe how a business plan can show a lending institution the potential success of a business venture.
3. Describe why a Business Plan should include a market survey, a survey of competition, a survey of site location, and a financial budget.
4. Describe the role of the business plan in guiding the organization and management of the enterprise.
5. Discuss strengths and weaknesses of a business plan from the lender's point of view.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Use handout or transparency of "Checklist" for class discussion of items to be evaluated in Business Plan.
2. Divide class into small groups using a sample Business Plan and have groups analyze the Business Plan for items needed in each major section.
3. Assign students another student's Business Plan to a business owner, of same type of business, for evaluation. Business owner should use the "Checklist".

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Handouts (Business Plan Checklist, Sample Business Plan,).

RESOURCES:

Bologh, Judy, et al, BEYOND A DREAM, Ohio State University, Columbus, OH. pp. 159-161. (Examples of checklist and business plan sample). 1985.

PACE, Unit 3, Level 2, page 168-170. (Same checklist and business plan as referenced above).

16.0 **COMPETENCY:** Develops a business operation plan.

16.3 **TASK:** Completes a business plan.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a proposed new business,

EVALUATION: completes a business plan.

STANDARD: The business plan will be typed and contain four major components: Description of the Business; Marketing Plan; Organization Plan; and Financial Plan. The Business Plan will be acceptable to a proposed lender.

STUDENT LEARNING EXPERIENCE:

1. Describe the major components of a business plan.
2. Describe the characteristics of an effective business plan.
3. Explain the importance of a well designed business plan to guide the initial organization and management of the business.
4. Explain the importance of a well-designed business plan to assist in obtaining financing for the new business.
5. Outline each of the four major components of a business plan.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide students with a sample of a business plan. Discuss components and importance.
2. Divide class into four groups. Assign each group one of the major components of the business plan. Each group compile a list of attributes that need to be included for their component. (Students may need to use a sample business plan as a guide). Finished product should be a "List of Questions to be Answered on the Business Plan." (Use Attribute Webbing critical thinking activity).
3. Using worksheets for each major part of the business plan, each student develops a rough draft for their business plan.
4. Provide case studies for Pricing Competition.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sample business plan.
2. Case study for pricing competition.
3. Worksheets for draft of each major part of business plan.

RESOURCES:

Bologh, Judy, et al., BEYOND A DREAM: AN INSTRUCTOR'S GUIDE FOR SMALL BUSINESS EXPLORATION. The National Center for Research in Vocational Education, Ohio State University, Columbus, OH. 1985.
-Unit 8: Pages 153-156 - discussion of what a business plan is and how it helps business owners.
Page 158 - Handout: Questions to be answered in a Business Plan.
Page 162 - Handout: Sample Business Plan
Page 175 - Transparency - "The Business Plan" defined.

Bellanca, Fogarty, Opeka, PATTERNS FOR THINKING. Illinois Renewal Institute, p. 14-15. (Attribute Webbing Activity). 1986.

Church, Olive D., ENTREPRENEURSHIP: STEP-BY-STEP. J. Weston Walch Publisher, Portland, ME. 1986.
-Topics and worksheet masters for: Naming the Company, The Owner - Qualifications, Training, Work Experience; Description of Business and Purpose; Location and Facility; The Market; The Competition; The Advertising Plan; The Employee Staffing Plan; Financial Data.

PACE. The National Center for Research in Vocational Education, Columbus, Ohio.Unit 3 - Levels 1 and 2. Level 2, page 5 and 6 - List of Questions to be Answered in a Business Plan. Level 2, page 29 - Sample Business Plan.

SPECIALIZED SMALL BUSINESS MANAGEMENT FOR TRADE, INDUSTRIAL, AND TECHNICAL AREAS, Volume II, MN. -Page 45-48 - Case studies on pricing competition. "The Anderson & Keith Company; Public Service.

16.0 **COMPETENCY:** Develops a business operation plan.

16.4 **TASK:** Identifies the professional assistance needed by the entrepreneur.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a proposed new business,

EVALUATION: identifies the types of professional assistance needed by the entrepreneur.

STANDARD: The list of sources of information and assistance that may be needed by the business is consistent with the business plan.

STUDENT LEARNING EXPERIENCE:

1. Determine why entrepreneurs need outside help.
2. Describe the assistance each of the following professional consultants can provide: accountant, lawyer, banker, and management consultant.
3. Identify local sources or referrals to obtain professional information and assistance.
4. Assess the strengths and weaknesses in your proposed business to identify technical assistance you may need.
5. Describe the value to a small business owner of having membership in service, professional and trade organizations.
6. Describe the reasons why persons in small businesses fail to obtain information and assistance from outside sources.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have students contact local trade and service organizations regarding the services provided to the small business owner. (Retail Merchants Assoc., Chamber of Commerce, etc.)

2. Utilize a panel composed of a banker, accountant, lawyer, management consultant, to provide discussion about the technical assistance each can provide to a small business owner.

3. Contact local SBA for guest speaker to provide information on service available from government and local agencies.

4. Have students interview a local business person to determine what types of services/assistance they have needed from outside sources.

5. Have students contact local university/college regarding those areas of help available to small business owners within their community.

6. Using a form for "assessing management skill and experience" each student will identify their strength and weaknesses in the business operation and need for outside assistance.

7. Provide a case study for analysis that will illustrate reasons why a small buisness owner may not seek outside assistance. (Suggest using creative thinking skill of Prediction (referenced below.)

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. List of addresses for contacting federal agencies, local and state agencies, private sector and special interest groups, college/universities with entrepreneur centers, trade and service organizations.

2. Yellow and White Pages of local telephone directory.

RESOURCES:

Bologh, Judy, et al., BEYOND A DREAM. The National Center for Research in Vocational Education, Ohio State University, Columbus, OH. pp. 176-210. 1985.
-Handout p. 180 - Technical Assistance Assessment.
-Handout p. 182-210 - Addresses for Resources Available for Small Business Owners.

Bellanca, Fogarty, Opeka, PATTERNS FOR THINKING. Illinois Renewal Institute. p. 92. (Predicting skill). 1986.

Cronin, Joseph M., et al., OWNING AND OPERATING A SMALL BUSINESS, Vol. II, Minneapolis, MN. pp. 12, 25-26. 1985. "Trade and Professional Organizations."

Rowe, Kenneth L. and Roger W. Hutt, PREPARING FOR ENTREPRENEURSHIP, AZ Department of Education, Phoenix, AZ. pp. 51-69. 1979.
-Student activity handouts - Determining Advantages and Disadvantages for hiring technical/professional assistance.

16.0 **COMPETENCY:** Develops a business operation plan.

16.5 **TASK:** Describes government rules and regulations affecting a business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a hypothetical business situation,

EVALUATION: describes the government rules and regulations affecting a business.

STANDARD: The applicable areas of government regulations will be included in the solution.

STUDENT LEARNING EXPERIENCE:

1. Discuss the significance of government rules and regulations to the business owner.
2. Describe city/county business permits and fees, required for the proposed business.
3. Determine the zoning ordinances for the proposed business location.
4. Describe state and federal taxes the business will collect and/or pay.
5. Summarize the intent of each of the following regulations or regulating agencies:
   -OSHA
   -Child Labor Laws
   -The Civil Rights Act of 1964
   -The Age Discrimination Act of 1973
   -The Federal Unemployment Tax Act
   -Workers Compensation Laws
   -Income Tax Laws
   -Social Security Tax Laws
   -Federal Trade Commission (FTC)
   -Federal Drug Administration (FDA)
   -Consumer Product Safety Commission (CPSC)
6. Classify legislation according to whom it is designed to protect.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present the class with the local rules and regulations over governing licenses, permits, building ordinances, and tax responsibilities: invite guest speakers form city planning department, accountant, small business administration.

2. Use a matching exercies for students to identify terms and definitions.

3. Use a case study for students to apply concepts.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Case study.

RESOURCES:

Church, Olive D, ENTREPRENEURSHIP: STEP-BY-STEP. J. Weston Welch Publisher, Portland, ME. p. 26. (Matching Exercise, "Laws Protecting Business and Consumers"). 1986.

Fallek, Max, HOW TO SET UP YOUR OWN SMALL BUSINESS, Vol. 1, Amer. Institute of Small Business, Minneapolis, MN. pp. 6.1906.22. 1987.

PACE. level 1 and level 2, units 10. -Case studies, Level 1 and 2. -Classification of federal regulations.

Rowe, Kenneth L. and Roger Hutt, PREPARING FOR ENTREPRENEURSHIP. Arizona Department of Education, pp. 135-145. (Exercises for identifying permits,licenses, and tax liabilities). 1979.

Woodburn, Clint H., ENTERPRENEURSHIP. THE ART OF BUSINESS OWNERSHIP. Vocational Instructional Services, Texas A and M University, College Station, TX, pp. 63-67. (General information on regulations and taxes.)

17.0 **COMPETENCY:** Manages human resources.

17.1 **TASK:** Describes the role of human resource management.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a business organization,

EVALUATION: describes the role of human resource management.

STANDARD: The major elements of HRM will be included in the description.

STUDENT LEARNING EXPERIENCES:

1. Define the process of human resource management.
2. Identify the major responsibilities in managing the human resources of a business.
3. Describe the obligations employers have to employees.
4. Identify the steps in hiring new employees.
5. Discuss various alternatives for evaluating employee performance.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have students interview job applicants in a role-playing situation using an Evaluation of Job Application worksheet (referenced below).
2. Give students a variety of communications - announcement of a job opening, new personnel policy, etc., and have students identify and justify the best form for communications.
3. Provide students with several appraisal forms and ask them to compare for objectiveness.
4. Divide the class into small groups and have them brainstorm ways of motivating employees.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Job applications.

RESOURCES:

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 203-208. 1986.

Fallek, Max, HOW TO SET UP YOUR OWN SMALL BUSINESS, Vol II, American Institute of Small Business, Minneapolis, MN. pp. 17.1-17, 37. (Job applicant worksheet). 1987.

PACE, The National Center for Research in Vocational Education, Ohio State University, Columbus, OH. Levels 1 and 2, Unit 12.

SPECIALIZED SMALL BUSINESS MANAGEMENT FOR TRADE, INDUSTRIAL, AND TECHNICAL AREAS, Vol, I, p. 27, Vol. II pp. 60-61. (Personnel managment function; the staffing function). Mississippi State, MS.

17.0 **COMPETENCY:** Manages human resources.

17.2 **TASK:** Defines and describes the functions of management.

PERFORMANCE OBJECTIVE:

CONDITIONS: Using the business plan for an existing or proposed business:

EVALUATION: defines and describes the functions of management.

STANDARD: The functions of management will include planning, organizing, staffing, directing and controlling.

STUDENT LEARNING EXPERIENCES:

1. Discuss the importance of effective management for a successful business.
2. Describe the general functions of management.
3. Describe how the business philosophy ties in with the function of planning.
4. Discuss the importance of long range and short range planning.
5. Describe the most important factors which should be considered in making forecasts.
6. Discuss the major areas of planning for the proper and efficient use of materials, equipment, and human resources.
7. Explain the principles of unity of command and span of control for organizing function.
8. Explain the meaning of line, staff, and functional authority in organizations.
9. Discuss the importance of the control function.
10. Explain the basic characteristics of effective controls.
11. Describe how the time spent in each of the five functions will vary with the postion within the management structure.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide students case problems to explore management decisions dealing with ethics.
2. Have students complete a self-analysis to determine readiness for managing a business.
3. Group students for analyzing case problems on the five functions of management.
4. Divide students in groups of three. Have on practice giving directives to another student. Third student analyzes directive for characteristics of good supervisory directive.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Case problems.

RESOURCES:

Haimann, Theo and Raymond Hilgert, SUPERVISION: CONCEPTS, AND PRACTICES OF MANAGEMENT, South-Western Publishing Company, Cincinnati, OH. pp. 21-37. (Case problems on functions of management). 1982.

SPECIALIZED SMALL BUSINESS MANAGEMENT FOR TRADE, INDUSTRIAL, AND TECHNICAL AREAS, Southeast Network for Curriculum Coordination, pp. 11-17. (Case studies and self-analysis).

17.0 **COMPETENCY:** Manages human resources.

17.3 **TASK:** Prepares an organizational chart.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a business organization,

EVALUATION: prepares an organization chart.

STANDARD: The organization chart will clearly illustrate titles, functions and flow of authority.

STUDENT LEARNING EXPERIENCES:

1. Define the purpose of written organization chart.
2. Explain the value of an organization chart to employees.
3. Describe the different organizational structures (models) which may be used in a specific industry.
4. Describe line and staff relationships.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide students with examples of organization charts of service business, a small retail store, small manufacturing firm. Have students expand the charts for a growing business.
2. Have students analyze an organization they know and develop an organization chart which they feel describes the organization.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Examples of transparencies of various organizational charts.

RESOURCES:

Luter, Robert R., ADVANCED MARKETING CURRICULUM, University of Texas, Austin, TX. pp. 247-279. 1985.

Rowe, Kenneth L. and Roger Hutt, PREPARING FOR ENTREPRENEURSHIP, pp. 171-175. (Examples of various organizational charts). Arizona Department of Education, Phoenix, AZ. 1981.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 203-208. 1986.

17.0 **COMPETENCY:** Manages human resources.

17.4 **TASK:** Uses an effective style of leadership.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a leadership situation,

EVALUATION: uses an effective style of leadership.

STANDARD: The style of leadership used will be based upon the individuals involved, the task to be accomplished, and the situation.

STUDENT LEARNING EXPERIENCES:

1. Define and describe leadership.
2. Describe the three traditional styles of leadership (autocratic, democratic, and laissez-faire).
3. Describe leadership style as a relationship between concern for production and concern for people (i.e. Blake and Mouton).
4. Describe the leadership model in which the style is determined by the situation (i.e. Hershey and Blanchard).
5. Describe the concept of participative management.
6. Evaluate leadership effectiveness in specific situations or incidents.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide students with a leadership questionaire which will allow them to determine their leadership style.

2. Divide students into small groups. Provide various case studies to be analyzed for most effective style of leadership.

3. The DECA student organization provides many opportunities for students to demonstrate leadership. Have students evaluate the leadership styles they observe in others and themselves in DECA.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Leadership questionaire on styles of leadership.

2. Case studies on leadership styles.

RESOURCES:

Luter, Robert R., ADVANCED MARKETING CURRICULUM, University of Texas, Austin, TX. pp. 205-217. 1985.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill Book Company, New York, NY. pp. 207-208. 1986.

SPECIALIZED SMALL BUSINESS MANAGEMENT FOR TRADE, INDUSTRIAL AND TECHNICAL AREAS. Vol. IV, The Southeast Network for Curriculum Coordination, Mississippi State, MS. pp. 1-2.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 339-343. 1980.

17.0 **COMPETENCY:** Manages human resources.

17.5 **TASK:** Orients new employees.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a real or simulated business situation,

EVALUATION: orients a new employee.

STANDARD: The orientation will follow a written outline and be validated by the new employee.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of orientation and training for new employees.
2. Describe the outcomes of an effective employee orientation.
3. Describe the methods of orienting a new employee.
4. Develop an orientation checklist for a specific position and/or organization.
5. Describe techniques which will aid the new employee in feeling a part of the organization.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Make a transparency for class discussion of the job instruction outline developed by the Manpower Commission.
2. Give student case studies that will illustrate necessity of training.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Case studies.

RESOURCES:

Fallek, Max, HOW TO SET UP YOUR OWN SMALL BUSINESS, Amer. Institute of Small Business, Minneapolis, MN. Training pp. 17.6-17.20. 1987.

Shinn, George, LEADERSHIP DEVELOPMENT. McGraw-Hill, New York, NY. pp. 216-222. 1986.

SPECIALIZED SMALL BUSINESS MANAGEMENT FOR TRADE, INDUSTRIAL, AND TECHNICAL AREAS. The Southeast Network for Curriculum Coordination, Mississippi State, MS. Vol. IV, pp. 23-24.
-Case Studies
-Discussion of the Manpower Commission's Job Instruction Outline

17.0 **COMPETENCY:** Manages human resources.

17.6 **TASK:** Prepares a job analysis.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific job title and business situation,

EVALUATION: prepares a job analysis, and job description.

STANDARD: The job description will incorporate the job analysis specifications and accurately reflect the nature and duties of the position.

STUDENT LEARNING EXPERIENCES:

1. Define job analysis, job specification, and job description.
2. Describe the purpose of a job analysis and its relationship to the job description.
3. Describe job specifications and relationship to job description.
4. Conduct a job analysis for a specific position in a given company or organization.
5. Describe the intrinsic value which could occur by asking employees for input to prepare a job description.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide students with forms to complete for the job analysis specification and description.

2. Provide example job descriptions for students to evaluate.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Job description worksheets.

RESOURCES:

Church, Olive D., ENTREPRENEURSHIP: STEP-BY-STEP J. Weston Walch Publishers, Portland, ME. p. 31. (Worksheet for job description). 1986.

Fallek, Max HOW TO SET UP YOUR OWN BUSINESS, Minneapolis, MN. (example and job description). 1987.

Rowe, Ken and Roger Hutt, PREPARING FOR ENTREPRENEURSHIP, Arizona Department of Education, Phoenix, AZ. pp. 151-158. (Worksheets for job description/analysis/specifications). 1979.

SPECIALIZED SMALL BUSINESS MANAGEMENT FOR TRADE, INDUSTRIAL, AND TECHNICAL AREAS Volume IV The Southeast network for Curriculum Coordination, Mississippi State, MS. 9-10.

PRODUCT AND SERVICE PLANNING

18.0 **COMPETENCY:** Analyzes the market for a product/service.

18.1 **TASK:** Identifies the sources of information for segmenting a market.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific product or service,

EVALUATION: identifies the sources of information for understanding and segmenting a market.

STANDARD: The sources of information will include primary and secondary sources previously identified by the instructor.

STUDENT LEARNING EXPERIENCES:

1. Define and illustrate market segmentation.
2. Define and describe demographics.
3. Define marketing information and discuss its importance in making marketing decisions.
4. Define and explain primary and secondary marketing information.
5. Identify specific sources where marketing information can be obtained.
6. Discuss how marketing information relates to market segmentation.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Give students examples of target markets that certain products/services focus in on. Describe why these people are chosen.

2. Have students in small groups develop a questionaire for your school. It could be questioning on buying habits, study habits, likes and dislikes, etc. Poll a random sample and give the results. See if your results correlate with some secondary sources of information.

3. Conduct a taste test at your school. See if your results correlate with that of company's whose product you tested.

4. Conduct the Creative Marketing Research Project sponsored by DECA.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Product samples and company information on products.

2. DECA Handbook.

RESOURCES:

Mason, Ralph, Patricia Rath, and Stewart Husted, MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, Novato, CA. pp. 126-147. 1986.

Stull, William and Roger W. Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Co., Cincinnati, OH. pp. 106-126. 1986.

AMERICAN DEMOGRAPHICS, P.O. Box 6543, Syracuse, NY. (magazine).

DECA GUIDE, Distributive Education Clubs of America, Reston, VA. pp. 57-64.

MARKET STRATEGIES, Economics Laps, Ohio State University, IDECC, Columbus, OH.

18.0 **COMPETENCY:** Analyzes the market for a product/service.

18.2 **TASK:** Identify the target market(s) for products and/or services.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific product and or service,

EVALUATION: identifies target market(s).

STANDARD: The report will reflect the characteristics that identify the market. These will include age, income, sex, education, occupation, lifestyle, ethnic background, and location.

STUDENT LEARNING EXPERIENCES:

1. Define market segmentation.
2. Define market demographics.
3. List and describe the demographic characteristics which are used in making marketing decisions.
4. Describe the demographics of certain markets for the specific products/services.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Bring in several products that focus in on several markets. Compare the characteristics of those markets by allowing students to name characteristics.
2. Show a film depicting market research and target markets. (see resources)
3. Have students develop a questionairre and conduct a test to pinpoint the characteristics of a certain market. The research can be conducted on campus, or at a local shopping area.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Several products.
2. Film projector.
3. Sample questionaires.

RESOURCES:

Mason, Ralph, Patricia Rath, and Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, Novato, CA. pp. 61-70. 1986.

Stull, William and Roger W. Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. pp. 189-207. 1986.

MARKET IDENTIFICATION, Economics Laps, IDECC, Ohio State University, Columbus, OH.

IS ANYBODY LISTENING? Arizona Council on Economic Education, Tucson, AZ (film and video cassette)

18.3 **TASK:** Develops a basic business idea from a hobby or special interest.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a hobby or special interest,

EVALUATION: develops a basic idea for business.

STANDARD: The report will include an explanation of the target market and how this product/service can be profitably marketed.

STUDENT LEARNING EXPERIENCES:

1. Describe how a hobby/interest may be the basis for establishing a business.
2. Identify the hazards in starting a small business based on a hobby or interest.
3. Describe specific businesses which were started as hobbies.
4. Describe a business opportunity that relates to a hobby or interest.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have each student fill out a self analysis to determine entrepreneurial skills.
2. Make a list of unique business that people have started. Discuss how bobbies evolve into profit making ventures.
3. Visit a small unique business and talk to the owner. Find out what advantages/disadvantages there are in owning & operating a business. Report these to the class.
4. Utilize the USA TODAY to expand on small business ideas.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Self analysis sheet.

RESOURCES:

Hutt, Roger, Kenneth Rowe. PREPARING FOR ENTREPRENEURSHIP, Arizona Dept. of Education, Vocational Education, Phoenix, AZ, pp. 1-21.

PACE, Program for Acquiring Competence in Entrepreneurship, The National Center for Research in Vocational Education, Ohio State University, Columbus, OH. Unit 1 & 2, Level 1 & 2.

USA TODAY, Gannett Corporation, Chandler, AZ. Monday, May 11, 1987-Special Small Business Bonus Section (newspaper).

18.0 **COMPETENCY:** Analyzes the market for a product/service.

18.4 **TASK:** Develops a marketing plan for a product or service.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific product/service or business,

EVALUATION: develops a marketing plan.

STANDARD: The plan will include an analysis of the target market, and a statement of strategies for marketing the product.

STUDENT LEARNING EXPERIENCES:

1. Define and describe the components of the marketing mix.
2. Define and describe the "4 P's" of marketing.
3. Describe and define channels of distribution.
4. Describe and define marketing institutions.
5. Compare of marketing plans and strategies.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Bring in various examples of marketing plans (especially from large business) and show students the differences and similarities.
2. Invite a marketing manager in to speak on marketing planning and policies.
3. Have students in small groups choose a business. Have them include goals for a short range marketing plan. What strategies are to used and a completion schedule. Share these with the rest of the class.
4. Give the class a hypothetical business with marketing data. Have each student prepare a marketing plan. Review the goals that are practical and suggested strategies that could be implemented.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Marketing plans from selected businesses.
2. Local business information, particularly marketing related.

RESOURCES:

Mason, Ralph, Patricia Rath, and Steward Husted MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, Novato, CA. pp. 372-378. 1986.

PACE, Program for Acquiring Competence in Entrepreneurship, The National Center ofr Research in Vocational Education, Ohio State University, Columbus, OH. Unit 11-13.

NOVEL IDEAS, McGraw-Hill Book Company, Novato, CA. (computer Simulation).

19.0 **COMPETENCY:** Explains product/service characteristics.

19.1 **TASK:** Explains the proper use and care of products.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product and/or product information in a demonstration situation,

EVALUATION: explains the proper use and care of a product.

STANDARD: The student shall illustrate the use and care of a product as specified by the instructions/information.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of accurate product information in marketing situations.
2. Stress the importance of following directions for care and use of various products.
3. Utilize product information in meeting product expectations.
4. Identify the major uses of selected products.
5. Manipulate a product demonstrating its use(s).
6. Describe the techniques for caring for a specific product.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present various products that have more than one use. Have class members explain as many uses of the product as possible.

2. In pairs or small groups, have students demonstrate and/or explain the proper care of a selected product.

3. Have students develop and conduct tests of specific products. Use Consumer Reports to get ideas for product testing.

INSTRUCTIONAL EQUIPMENT, MATERIALS & SUPPLIES:

1. Products that are conducive to demonstrative methods.

2. Product information.

RESOURCES:

Ditzenberger, Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY, South-Western Publishing Company, Cincinnati, OH. pp. 87-163, 146-161, 175-178. 1986.

Mason, Ralph, Patricia Rath, and Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, Novato, CA. pp. 346-353. 1986.

Stull, William and Roger W. Hutt, MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinatti, OH. pp. 229-253. 1986.

YOU AND YOUR CUSTOMERS, 16 mm film, U.S. Small Business Administration, Washington, DC.

19.0 **COMPETENCY:** Explains product/service characteristics.

19.2 **TASK:** Explains applicable grades and standards.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product or service which has applicable grades and/or standards,

EVALUATION: explains grades and standards.

STANDARD: The explanation will include characteristics of each standard/grade and how the product does or does not meet the standard.

STUDENT LEARNING EXPERIENCES:

1. Define what is meant by standardization.
2. Define what is meant by grading.
3. Identify examples of specific product/service standards.
4. Identify examples of specific grading systems.
5. Describe the sources of product grades and standards and how they are developed.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Bring in various products that are graded accordingly. Show the differences and explain the grade given for that specific product.
2. Invite an inspector from a Federal, State, or local government agency to speak on grading and standards of certain products/services.
3. Have each student make a list of several products that have unique grading and standards. They may interview a supermarket manager to get specific details.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Products for demonstration.

RESOURCES:

Mason, Ralph, Patricia Rath, Steward Husted. MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, Novato, CA. pp. 107-113. 1986.

Stull, William and Roger W. Hutt. MARKETING: AN INTRODUCTION South-Western Publishing Company, Cincinnati, OH. pp. 23-48. 1986.

CAREER COMPETENCIES IN MARKETING SERIES - FOOD MARKETING; GENERAL MERCHANDISE, McGraw-Hill, Inc., (manuals). 1979.

CONSUMER GUIDE TO FOOD LABELS, Consumer Information Catalog, p.o. Box 100, Pueblo, CO 81002 (pamphlet)

19.0 COMPETENCY: Explains product/service characteristics.

19.3 TASK: Explain warranties and guarantees.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific product or service which is sold with a warranty or guarantee,

EVALUATION: explains the warranty and/or guarantee.

STANDARD: The explanation will include the type of warranty, what minimum standards have been met, what rights are available. and what recourse is available.

STUDENT LEARNING EXPERIENCES:

1. Define a warranty and/or a guarantee.
2. Identify and describe the types of warranties (full, limited, implied, expressed).
3. Identify the provisions that should be included on written warranties
4. Describe the value of a warranty in a selling situation.
5. Explain product liability as related to warranties

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Make a chart of the various warranties. Point out the characteristics of each and give examples of each.

2. Break up in small groups and give each group a case study of a contractual situation. Have each group discuss the details with the rest of the class and give a recommendation.

3. Invite a lawyer who deals with contracts. Have this person give examples of court cases and the enfources of warranties.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Poster board and pens.

2. Case study.

RESOURCES:

Meyer, Warren, Peter Haines, and E. Edward Harris RETAILING PRINCIPLES AND PRACTICES. McGraw HIll Book Company, Novato, CA. pp. 441-448. 1982.

Mietus, Adamson, and Conry, APPLIED BUSINESS LAW, South-Western Publishing Company, Cincinnati, OH. pp 322-339. 1986.

CONSUMER RESOURCE HANDBOOK, Consumer Information Handbook, P.O. Box 100, Pueblo, CO 81002 (Pamphlet)

19.0 **COMPETENCY:** Explain product/service characteristics.

19.4 **TASK:** Explains consumer protection provisions of appropriate agencies.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific product or product line,

EVALUATION: explains consumer protection provisions of appropriate agencies.

STANDARD: The report will include at least one federal agency, state agency, a local agency and private organization. The names of the agencies and the function they serve will be included.

STUDENT LEARNING EXPERIENCES:

1. List the areas where possible problems could arise in the marketplace, including:
   a. Buying and Selling Transactions
   b. Contracts
   c. Deceptive Consumer Practices
   d. Warranties and Guarantees
   e. Employment Practices
   f. Environmental Provisions
   g. Safety Provisions
2. List and describe federal agencies which are involved in consumer protection.
3. List and describe state and local government agencies which are involved in consumer protection.
4. List and describe private organizations which are involved in consumer protection.
5. Match a consumer problem with the appropriate agency with the corresponding problem.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Point out to students various deceptive practices that are common among consumers. Relate as to why these agencies are needed to curb these deceptive practices.
2. Show the filmstrip "Justice in the Marketplace". Review the filmstrip with questions and related points. (See resources)
3. Invite a guest speaker from the state attorney's office or the Better Business Bureau. Have the person talk on consumer diputes and how to go about handling problems.
4. Have students write a mock consumer dispute letter or possibly a real complaint letter. See what kind of response is returned.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Meyer, Warren G., Peter Haines,and E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. Chapter 18. 1982.

ARIZONA CONSUMER EDUCATION CURRICULUM GUIDE, Arizona Dept. of Education, Division of Career and Vocational Education, 1980.

A GUIDE TO CONSUMER ACTION DIRECTORY OF FEDERAL CONSUMER OFFICES Consumer Information Center, Pueblo, CO, 81009 (pamphlets)

Federal Reserve System, 400 Sansome St., P.O. Box 7702, San Francisco, CA. (pamphlets)

JUSTICE IN THE MARKETPLACE, Changing Times Education Service, 1729 H Street, N.W., Washington D.C. 20006, (filmstrip)

Local Better Business Bureau (agency)

DISTRIBUTION

20.0 **COMPETENCY:** Determines the store/business facility.

20.1 **TASK:** Identifies types of zoning restrictions.

PERFORMANCE OBJECTIVES:

CONDITIONS: Given information regarding local zoning laws and restrictions,

EVALUATION: identifies types of zoning restrictions.

STANDARD: Types of zoning correctly match local laws and restrictions.

STUDENT LEARNING EXPERIENCES:

1. Define and give examples of types of zoning and restrictions (easements rights of way, abandonments, etc.)
2. Explain why zoning is important and necessary.
3. Explain zoning cost factors (example: re-zoning costs).
4. Identify types of products/services that may have zoning restrictions.
5. Identify types of zoning restrictions for signs.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Excellent source of local zoning information is a city planner, as a guest speaker.

2. Take class on a field trip to a zoning board meeting. Often, this activity requires evening hours.

3. Invite local business person with special licenses (i.e. liquor) to speak to class about personal experiences with zoning restrictions.

4. Give written exam on purpose and types of zoning restricions.

5. Develop a "community" as a class project.

6. Identify several pro's and con's of zoning restricions.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Local zoning laws from city hall.

2. Illustrated zoning maps

RESOURCES:

Ely, Vivien King, STARTING YOUR OWN MARKETING BUSINESS, McGraw-Hill Book Company, New York, NY. 1978.

Everhard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT, South-Western Publishing Company, Cincinnati, OH. p. 67. 1979.

Mason, Ralph, Patricia Rath and Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. 1986.

Meyer, Warren G., Peter Haines, and E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. p. 450. 1982.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. p. 450. 1982.

20.0 **COMPETENCY:** Determines the store/business facility.

20.2 **TASK:** Selects an appropriate business location.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given information on alternate business locations,

EVALUATION: determines a site appropriate for a defined business.

STANDARD: Completes a checklist of decisions involved in choosing a store site, with information substantiating/validating investigation of each factor.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of location for a business.
2. Determine market for the product/service including a demographic and a geographic study.
3. Describe the desired characteristics of a location for a specific business.
4. Complete a traffic analysis of a potential business location.
5. Identify possible restrictions of a possible business location including, size, parking, neighborhood, drainage, zoning, etc.
6. Explain how to determine accessibility requirements.
7. Describe the importance of visibility.
8. Determine the trading area for a specific location.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Identify a specific type of business and require assigned groups of four to determine best available location within a defined area.

2. Require individuals to interview at least one business owner on why he/she chose his/her current location, and what changes this person would like to make regarding location.

3. Require each student to do a traffic study of a location. Compare findings.

4. Provide description of several types of businesses and discuss locations that would immediately be ruled out.

5. Invite banker and/or business owner to speak to class on importance of business location.

6. Do a market research study with local consumers, ranking preference for specific location of a given business, given at least three choices.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. City maps.

2. Shopping center layouts.

RESOURCES:

Ely, Vivien King, STARTING YOUR OWN MARKETING BUSINESS, McGraw-Hill Book Company, New York, NY. Chapter 3. 1978.

Hutt, Roger W., CREATING A NEW ENTERPRISE, South-Western Publishing Company, Cincinnati, OH. pp. 85-87. 1982.

Lynch, Richard L., INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. pp. 227. 1984.

Meyer, Warren G., RETAILING PRINCIPLES AND PRACTICES, 7th Edition. McGraw-Hill Book Company, New York, NY. Chapter 69. 1982.

Poe, Roy W., GETTING INVOLVED WITH BUSINESS, McGraw-Hill Book Company, New York, NY. (proj 2). 1981.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. Chapter 10-11. 1982.

PACE, LOCATING THE BUSINESS, National Center for Research in Voc. Ed. Ohio State University, Columbus, OH. Unit 7. Levels 1 and 2.

SBA-SMA FACTORS IN CONSIDERING A SHOPPING CENTER LOCATION, #143.
LOCATING OR RE-LOCATING YOUR BUSINESS, #201
USING CENSUS DATA TO SELECT A STORE SITE, #154

20.0 **COMPETENCY:** Determines store/business facility.

20.3 **TASK:** Develops an appropriate store/facility design and layout.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given an image desired for a business,

EVALUATION: develops an appropriate store/facility design and layout.

STANDARD: Includes a list of selling and non-selling equipment, and a rough sketch of interior layout.

STUDENT LEARNING EXPERIENCES:

1. Determine the amount of space (square feet) that will be needed for the business facility.
2. Differentiate between selling space and non-selling space.
3. Describe the importance of traffic flow and how it influences sales.
4. Describe display and merchandising equipment, and how it should be selected.
5. Describe the importance of lighting in a store or business facility.
6. Evaluate store layout designs.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Develop as a class project a school store design and layout.
2. Ask an equipment and fixture company representative to speak to class.
3. Ask a professional planner to speak to class.
4. Field trip to 2 school stores to study design and lay-out.
5. Field trip to commercial decorating firm.
6. Require each individual to develop a sketch of store layout, including lighting, storage, payment points, and entrances. Compare and develop model sketch.
7. Written test on identifying types of store fixtures available.
8. Contest for best exterior and interior design.

INSTRUCTIONAL EQUIPMENT, MATERIALS, SUPPLIES:

1. Pen and paper.
2. Real store layout drawings.
3. Trade magazines and journals.
4. Illustrations of lighting systems.

RESOURCES:

Humbert, Jack T., PETROLEUM MARKETING, McGraw-Hill Book Company, New York, NY. 1979.

Mason, Ralph E., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. 1986.

Mathison, Marilyn, APPAREL AND ACCESSORIES, McGraw-Hill Book Company, New York, NY. 1979.

Meyer, Warren G., Peter Haines, and E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. Chapter 70. 1982.

Reece, Barry L., FOOD MARKETING, McGraw-Hill Book Company, New York, NY. 1979.

Samson, Harland E., RETAIL MERCHANDISING. South-Western Publishing Company, Cincinnati, OH. Chapter 12 and 13. 1982.

Smith, Gary R., DISPLAY AND PROMOTION, McGraw-Hill Book Company, New York, NY. Chapter 6. 1978.

Smith, William O., FOOD SERVICES, McGraw-Hill Book Company, New York, NY. 1979.

Stull, William A., MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. Chapter 13. 1986.

Vorndran, Barbara S., GENERAL MERCHANDISE RETAILING, McGraw-Hill Book Company, New York, NY. 1979.

21.0 **COMPETENCY:** Processes inventory and inventory records.

21.1 **TASK:** Checks incoming stock and completes receiving reports.

PERFORMANCE OBJECTIVES:

CONDITIONS: Given actual or simulated "incoming" stock, and a receiving record,

EVALUATION: checks incoming stock and complete receiving report.

STANDARD: Information recorded in correct spaces on form, verifying condition, quantity, and correctness of shipment.

STUDENT LEARNING EXPERIENCES:

1. List the information one would expect to find on a receiving record. (Receiving clerk, shipper, shipped from, received via, carrier number, pieces received, weight, charges, department, receiving number and date received.)
2. Describe the process used to check a freight bill.
3. Explain what one watches for when counting each piece as it is delivered.
4. Describe the kinds of marks one makes on the pieces after a typical delivery.
5. Develop a list of all elements to check before signing the freight bill.
6. Check actual freight bill against merchandise delivered, fill in the receiving record, mark the pieces, check the weight, sign the freight bill, and check the purchase order against the invoice.
7. Determine what to do when discrepancies are found between p.o. and invoice.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Intruct entire class on how to fill out a receiving report.
2. Require each individual to fill out a receiving report for stock received for school store or fund raising activity.
3. Provide freight bills and purchase orders. Give students practice in matching one to the other.
4. Visit a local store, school bookstore, or cafeteria when a shipment is received.
5. Require each student to develop a receiving report for your school store or student organdization.
6. Invite a shipper/receiver to speak to class about receiving methods.
7. Count tinker toys to provide practice and to test attention to details.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Blank receiving reports.
2. Tinker toys (or similar items).
3. Freight bills.
4. Purchase orders and invoices.
5. Boxed "freight" to check.
6. Markers.

RESOURCES:

Everard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT, South-Western Publishing Company, Cincinnati, OH. Chapter 8. 1979.

Mason, Ralph E., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. p. 294. 1986.

Meyer, Warren G., Peter Haines, and E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. Chapter 18. 1982.

Moffett, Carol Willis, THE RECEIVING CHECKING MARKING CLERK, McGraw-Hill Book Company, New York, NY. Chapters 4-5, 10, 16. 1980.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. Chapter 45. 1982.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. Section 5. 1982.

Stull, William A., and Roger W. Hutt. MARKETING: AN INTRODUCTION, Southwestern Publishing Company, Cincinnati, OH. Chapter 15. 1986.

Stull, William A., MARKETING MATH, South-Western Publishing Company, Cincinnati, OH. 1985.

Tyler, Elias S., MATERIALS HANDLING, McGraw-Hill Book Company, New York, NY.

21.0 **COMPETENCY:** Processes inventory and inventory records.

21.2 **TASK:** Price marks merchandise.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given price information and price tickets,

EVALUATION: price marks merchandise.

STANDARD: Price mark merchandise using correct form and containing all necessary information.

STUDENT LEARNING EXPERIENCES:

1. Describe the types of price tickets and merchandise items each is used for.
2. Describe the types of information that may be included on a price ticket.
3. Describe decisions that must be made before an item is marked.
4. Describe the UPC marking system.
5. Explain the major advantages of the OCR marking system over the regular printed or marked price tickets.
6. Describe the security provisions of price-ticketing merchandise.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Require students to bring empty boxes, labels, bottles, etc., to class. Discuss how each item was or should be marked.

2. Bring in and show students various price marking labels and tags.

3. Visit school store or local store to point out various price marking methods used.

4. Provide instruction on all major price marking methods used. Break into groups of threee or four to develop a list of how merchandise in classroom should be price marked if for sale.

5. Discuss why some types of merchandise are not price marked at all.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Illustrations of 12 different price tickets (referenced below).

2. Actual price tickets, labels, and tags.

RESOURCES:

Everard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT, South-Western Publishing Company, Cincinnati, OH. Chap 9. 1979.

Lynch, Richard L., INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. Unit 5. 1984.

Mason, Ralph E., Patricia Rath, Steward Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Co. New York, NY. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. Chap 41, 58. 1982.

Moffet, Carol W. THE RECIEVING, CHECKING, MARKING CLERK, 2nd Edition, McGraw-Hill Book Co. New York, NY. Chapter 11. 1980.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, Chapter 46. 1982.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. Section 6. 1974.

Stull, William A., and Roger Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Co. Cincinnati, OH. Chapter 14. 1986.

Stull, William A., MARKETING MATH, South-Western Publishing Company, Cincinnati, OH. 1985.

Tyler, Elias S., MATERIALS HANDLING, McGraw-Hill, New York, NY.

21.0 **COMPETENCY:** Processes inventory and inventory records.

21.3 **TASK:** Makes and records price changes.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given store policy for price changes, and a series of pricing situations,
EVALUATION:	makes and records price changes.
STANDARD:	Make and record all price changes with 100% accuracy.

STUDENT LEARNING EXPERIENCES:

1. Describe the circumstances in which price changes might be made.
2. Differentiate between private and public price changes.
3. Describe the procedures for changing prices, including changes in stock control records.

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SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Ask a local retailer to speak to the class, describing conditions under which price changes might be made, and how they are recorded.

2. Given a price list, quantity cost list, turnover rate and minimum turnover rate acceptable have students determine when price reduction should be made and how much.

3. Provide students with formula for calculating the percentage of retail reduction caused by reducting the price on certain items. Retail Reductions=Dollar Reductions divided by Total Sales.

4. Discuss the most important reasons for markdown (over pricing, overestimation of demand, returns, shopworn merchandise, and promotional seasons).

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Price change forms.

2. Price lists.

RESOURCES:

Carlo, Patrick A., MERCHANDISING MATHEMATICS, Delmar Publishers, Albany, N.Y. 1973

Everard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT South-Western Publishing Company, Cincinnati, OH. Chapter 9. 1979.

Lynch, Richard L., INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. p. 316. 1984.

Mason, Ralph E., Patricia Rath, and Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. 1986

Meyer, Warren G., RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. 1982.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. pp. 265-271. 1982.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. p. 81. 1974.

Stull, William A., MARKETING MATH, South-Western, Cincinnati, OH. 1985

21.0 **COMPETENCY:** Processes inventory and inventory records.

21.4 **TASK:** Finds pricing errors and corrects them.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a collection of merchandise containing some pricing errors,

EVALUATION: finds pricing errors and correct them.

STANDARD: Incorrectly priced items are corrected, others are unchanged.

STUDENT LEARNING EXPERIENCES:

1. Compare price tickets to stock lists and identfy errors.
2. Calculate given mark-up percent and correct price ticket or stock list.
3. Calculate given mark down percent and correct price ticket or stock list.
4. Check and correct prices on items with "cents off" labels.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Develop a price list for a variety of merchandise in school store or classroom. Require students to match list with marked merchandise and find errors.

2. Visit a local store that uses scanners to find pricing errors, and observe its use.

3. Give students a mark-up percent and cost for various merchandise real or simulated, and a price list. Require each student to find price errors and correct them.

4. Provide students with a price list of merchandise and an ad. Require students to verify correctness of price based on advertised price.

5. Provide students with a price list of merchandise markdown percent. Require students to verify correctness of price based on markdown percent.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Price tickets and stock lists.
2. Merchandise to mark.
3. Newspaper ads
4. Price list.

RESOURCES:

Carlo, Patrick A., MERCHANDISING MATHEMATICS, Delmar Publishers, Albany, NY. 1973.

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, New York, NY. 1978.

Lynch, Richard L., INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. Unit 5. 1984.

Mason, Ralph W., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. 1979.

Reece, Barry L., FOOD MARKETING, McGraw-Hill Book Company, New York, NY. 1979.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. p. 261. 1982.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. Section 6. 1974.

Stull, William A., Roger W. Hutt. MARKETING: AN INTRODUCTION, Southwestern Publishing Company, Cincinnati, OH. Chapter 15. 1986.

Stull, William A., MARKETING MATH, South-Western Publishing Company, Cincinnati, OH. 1985.

Warmke, R. F., PRINCIPLES OF MARKETING, South-Western Publishing Company, Cincinnati, OH. 1985.

21.0 **COMPETENCY:** Processes inventory and inventory records.

21.5 **TASK:** Maintains stock control records.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given an actual or simulated inventory control system for a specified time period,

EVALUATION: maintains stock control records.

STANDARD: Stock control records are 100% accurate at the end of the designated time period.

STUDENT LEARNING EXPERIENCES:

1. Explain the goals of an effective stock control system.
2. Explain the difference between unit control and dollar control.
3. Define and describe model stock list and basic stock lists.
4. Explain why the check list system is often called the never-out system.
5. Describe a reserve requisition system.
6. Describe the warehouse control system.
7. Define stock shrinkage and possible reasons for it.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have local store or school store representatives speak about the stock control methods they use.

2. Help students develop a perpetual inventory system for either the school store or for a fund raising activity.

3. Develop a mock business, providing a minimum stock amount, re-order point, & maximum stock for each item. Require each student to keep a perpetual inventory as you provide stock "information"

4. Simulate a perishable item. Help students determine from stock control records if inventory & turnover is acceptable.

5. Using stock records, discuss when stock shrinkage goes from "acceptable" to "unacceptable".

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Stock record cards.
2. Stock control records.

RESOURCES:

Boone, Louis E., CONTEMPORARY MARKETING, The Dryden Press, N.Y., Chapter 13. 1985.

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, New York, NY. 1978.

Lynch, Richard L., INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. Chapter 9. 1984.

Mason, Ralph E., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Co. New York, NY. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. Chapter 20, 38, 39. 1982.

Moffet, Carol. THE RECEIVING, CHECKING, MARKING, CLERK, 2nd Edition, McGraw-Hill Book Company, New York, NY. Chapter 12. 1980.

Reece, Barry L., FOOD MARKETING, McGraw-Hill Book Company, New York, NY. 1979.

Samson, Harland E., RETAIL MERCHANDISING, South-Western, Cincinnati, OH. Chapter 48. 1982.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. 1982.

Stull, William A., MARKETING MATH, South-Western Publishing Company, Cincinnati, OH. 1986.
STOCK CONTROL FOR SMALL STORES, SBA-SMA # 123

21.0 **COMPETENCY:** Processes inventory and inventory records.

21.6 **TASK:** Transfers stock to storage or sales point.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given stock and information about storage area, sales area, inventory levels at both areas, and store policies,

EVALUATION: transfers stock to storage or sales point.

STANDARD: Stock transfer decision and methods meet store expectations and standards.

STUDENT LEARNING EXPERIENCES:

1. Explain why merchandise should be handled as little as possible.
2. Explain why merchandise should be handled as fast as possible.
3. Define FIFO.
4. Demonstrate how to "front" old stock.
5. Complete and describe a bin ticket.
6. Choose the best way to move different types and amounts of merchandise.
7. Fill out a transfer document for goods being transfered from one store to another.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Ask book store personnel to discuss and show class how decisions are made about what to put in storage and what to put at sales point.
2. Provide a mock inventory item, number wanted in sales area, and minimum number to be kept in storage. Date each item. Demonstrate FIFO method and how to front merchandise.
3. Discuss equipment available for use in moving stock. Explain different uses for each type of equipment.
4. Show and demonstrate how turnover rate might dictate a change in amount of stock transferred to sales area.
5. Tour a stock area to observe methods used to locate and place incoming stock.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Bin tickets.
2. Dated general merchandise stock.
3. Illustration of equipment for moving stock.
4. Transfer forms.

RESOURCES:

Boone, Louis E., CONTEMPORARY MARKETING, The Dryden Press, New York, NY. Chap. 13. 1985.

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, New York, NY. 1978.

Ertel, Kenneth A., WHOLESALING AND PHYSICAL DISTRIBUTION, McGraw-Hill Book Company, New York, NY. Chap 9. 1978.

Lynch, Richard L. INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. Chapter 9. 1984.

Mason, Ralph E., MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. Chapter 39. 1982.

Moffet, Carol. THE RECEIVING, CHECKING, MARKING, CLERK, McGraw-Hill Book Company, New York, NY. (chap 7). 1980.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. Chapter 45. 1982.

Stull, William A., MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. Chapter 15. 1986.

Warmke, R. F., PRINCIPLES OF MARKETING, South-Western Publishing Company, Cincinnati, OH. 1985.

IMPROVING MATERIAL HANDLING IN SMALL BUSINESS, SBA #1 12:4

21.7 **TASK:** Processes returns to vendors.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a store policy on vendor returns and information on merchandise situations,

EVALUATION: processes return to vendors.

STANDARD: Report is completed according to policy with 100% accuracy

STUDENT LEARNING EXPERIENCES:

1. Describe the reasons for returns.
2. Differentiate between "concealed" and "visible" damage.
3. Describe the process for returning merchandise to a vendor.
4. Determine best way to ship returnable goods.
5. Determine shipping costs for returnable goods.
6. Complete a charge back form.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide merchandise return forms to class. Using mock information related to damages or spoiled items, fill out forms for returning merchandise.

2. Explain and define a "built-in defective" allowance. Give class shipment amounts and defective amount of simulated items. Have each student determine if defective allowance amount is fair.

3. Discuss circumstances under which merchandise is physically exchanged at the store site, rather than shipped to vendor.

4. Ask bookstore, cafeteria, or local store representative to discuss with class standards they use in determining what constitutes returnable or damaged merchandise.

5. Ask parcel shipper or post office representative to speak to class on how to package items being returnable to vendor.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Merchandise return forms.

2. Ledger.

3. "Damaged" goods.

4. Packaging materials.

RESOURCES:

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, New York, NY. 1978.

Ertel, Kenneth A., WHOLESALING AND PHYSICAL DISTRIBUTION, McGraw-Hill Book Company, New York, NY. Chapter 8. 1978.

Mason, Ralph E., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. 1986.

Meyer, Warren G., RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. pp. 141-142. 1982.

Moffet, Carol. THE RECEIVING, CHECKING, MARKING CLERK, 2nd Edition. McGraw-Hill Book Company, New York, NY. Chapter 16. 1978.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. pp. 425. 1982.

Warmke, R. F., PRINCIPLES OF MARKETING, South-Western Publishing Company, Cincinnati, OH. 1985.

21.0 **COMPETENCY:** Processes inventory and inventory records.

21.8 **TASK:** Selects transportation to ship and receive merchandise.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given product information, time frames, and cost restrictions,

EVALUATION: selects transportation to ship and receive merchandise.

STANDARD: Chosen method is possible, meets time restrictions, and is within budget allowed.

STUDENT LEARNING EXPERIENCES:

1. Explain the importance of motor carriers.
2. Explain the difference between interstate and intrastate carriers.
3. Define common, contract, private, and exempt motor carriers.
4. List questions a shipping and receiving clerk might ask before selecting a carrier.
5. Define freight forwarder.
6. Determine ratings for items from the Uniform Freight Classification book.
7. Describe containerization and piggyback systems.
8. Describe the classes of mail delivered by the U.S. Post Office.
9. Identify and compare overnight express services.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Bring in a guest speaker from the Interstate Commerce Commission to discuss transportation regulations.
2. Take class on a tour of a trucking, railroad, air freight, and/or parcel service.
3. Have students develop collages of common carriers.
4. Have students choose transportation for simulated shipments, given costs, restrictions, and delivery time.
5. Provide copies of Uniform Freight Classification to class, require individuals to find ratings for 10 shipments.
6. Ask a freight forwarder to speak to the class about how transportation choices are made.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Uniform Freight Classification Book.
2. Illustrations of freight equipment.

RESOURCES:

Boone, Louis E., CONTEMPORARY MARKETING, The Dryden Press, New York, NY. pp. 353-364. 1985.

Ertel, Kenneth A., WHOLESALING AND PHYSICAL DISTRIBUTION, McGraw-Hill Book Company, New York, NY. Chapter 6. 1978.

Everard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT, South-Western Publishing Co. Cincinnati, OH. pp. 166-171. 1979.

Lynch, Richard L., INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. pp. 258-265. 1984.

Mason, Ralph E., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, NY. pp. 282-289. 1986.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. p. 67 and project 29. 1982.

Stull, William A., Roger W. Hutt. MARKETING: AN INTRODUCTION, Southwestern Publishing Co. Cincinatti, OH. Chapter 15. 1986.

Tyler, Elias S., MATERIAL HANDLING, McGraw-Hill Book Company, New York, NY.

Warmke, R. F., PRINCIPLES OF MARKETING, South-Western Publishing Company, Cincinnati, OH. Chapter 8. 1985.

PURCHASING

22.0 **COMPETENCY:** Purchases merchandise for resale.

22.1 **TASK:** Advises buyer of customer requests or reactions.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of customer requests for merchandise not carried, and comments about merchandise.

EVALUATION: advises buyer of customer requests or reactions.

STANDARD: Report summarizes significant comments by customers in a manner which will assist the buyer.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of sales personnel making buyers or merchandise managers aware of customer needs and reactions.
2. Describe the use of want slips to report merchandise requests.
3. Complete want slips after hearing a customer's request for an item not carried in stock, or out of stock.
4. Complete rain checks.
5. Analyze and report information regarding customer reaction to specific products/services.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide several blank and completed want slips to class. Show how each is filled out. Complete want slips.
2. Describe a store to the class. Provide information related to sales volume, etc. Provide filled out want slips and discuss whether buying a new item or increasing inventory of a currently stocked item may be warranted.
3. To point out importance of writing things down, verbally make requests to class, but do not allow students to write requests down till at least after class. Discuss potential problems caused when requests are not written down immediately.
4. Verbally pass a request along through five or six students to point out importance of writing down requests.
5. Fill out want slips for school store or during fund raising activity.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Rain checks.
2. Want slips.

RESOURCES:

Ditzenberger, Roger, John Kidney. SELLING - HELPING CUSTOMERS BUY, South-Western Publishing Company, Cincinnati, OH. pp. 238. 1986.

Meyer, Warren G., Patricia Rath, Stewart Husted. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. p. 487. 1982.

Poe, Roy W., GETTING INVOLVED WITH BUSINESS, Gregg/McGraw-Hill Book Company, New York, NY. pp. 102-103. 1981.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. p. 229. 1982.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. Section 2. 1974.

Stull, William A., MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. p. 308. 1986.

Wingate, John W., Fundamentals of Selling, South-Western Publishing Company. Cincinnati, OH. p. 391. 1976.

22.0 **COMPETENCY:** Purchases merchandise for resale.

22.2 **TASK:** Comparison shops competitors.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given specific merchandise items, comparison shopping report guidelines, and the opportunity to visit several alternate businesses,

EVALUATION: writes a comparison shopping report.

STANDARD: Report will contain information clearly describing price, display methods, packaging used, quality (including material and construction) and advertising of competitors merchandise, with a written comparison summary.

STUDENT LEARNING EXPERIENCES:

1. Describe the role of competition in marketing.
2. Describe comparison shopping and how businesses gather and use this this type of data.
3. Compare specific competing products by analyzing features and benefits.
4. Develop a checklist for evaluating competing businesses.
5. Compare the advertisements for competing businesses.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide several pairs of "similar" merchandise. Instruct individuals to write a feature/benefit list for each item for use in comparing.

2. Assign groups who designate a member to locate and take pictures of displays of similar merchandise to use in comparing.

3. As a class, discuss ranking techniques used by magazines such as Consumer Report, and why stores may choose to carry lowest and highest ranked merchandise.

4. Class discussion and evaluation of different types of packaging for similar items. Students bring examples. For instance: bring several different "soft drink" packages.

5. Bring newspaper ads to class. Discuss value in doing comparison shopping of "ads".

6. Have students list which stores within a 3 mile radius, would be considered a competitor for their training station or for a store you identify.

7. Comparison shop identical products to find price differences, and display differences.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Camera.

2. Newspaper ads.

3. General merchandise items.

4. Consumer Report magazine.

RESOURCES:

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, New York, NY. 1978

Everard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT, South-Western Publishing Company, Cincinnati, OH. p. 136. 1979.

Hutt, Roger W., CREATING A NEW ENTERPRISE, South-Western Publishing Company. Cincinnati, OH. pp. 61-62, 85. 1982.

Lynch, Richard L., INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. p. 226. 1984.

Mason, Ralph E., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, NY. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. p. 124. 1982.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. pp. 230-231. 1982.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. Project 12-13. 1974.

Stull, William A., Roger Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. p. 309. 1986.

22.3 **TASK:** Completes stock counts.

PERFORMANCE OBJECTIVE:

CONDITION: Given an actual or simulated assortment of merchandise and inventory forms,

EVALUATION: completes a stock count.

STANDARD: Completed stock count includes each item, with correct stock number, age, price and size/color.

STUDENT LEARNING EXPERIENCES:

1. Explain the difference between a physical inventory and perpetual inventory.
2. Define shortage and overage. Explain why each might occur.
3. Explain what is meant by "valuing merchandise at cost or market, whichever is lower."
4. Explain what book inventory and opening inventory means.
5. Explain alternative methods for taking a physical inventory.
7. Explain the problems an inaccurate stock count might cause.
6. Define "tickler control", "reorder control", and "visual control" for stock counting.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss the two types of inventory and reasons for each method.
2. Take group to store to observe a physical inventory.
3. Do a physical inventory for a local store.
4. Ask book store or school cafeteria personnel to show group how inventory records are kept.
5. Develop a perpetual inventory for school store or fund raising. Require individuals to keep a perpetual inventory.
6. Have students with training station describe their training stations' procedure for taking a physical inventory.
7. Inventory everything in classroom in groups of four; then compare to find and discuss errors/differences.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Pen and paper.
2. Ledger forms.
3. Inventory tags.
4. Overhead projector.

RESOURCES:

Boone, Louis E., CONTEMPORARY MARKETING, The Dryden Press, New York, NY. p. 366. 1985.

Carlo, Patrick A., MERCHANDISING MATHEMATICS, Delmar Publishers, Albany, N.Y. 1973.

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, New York, NY. 1978.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. Unit 13. 1982.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. Chapter 48. 1982.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. Section 2. 1974.

Stull, William A., MARKETING MATH, South-Western Publishing Company, Cincinnati, OH. 1985.

Tyler, Elias S., MATERIALS HANDLING, McGraw-Hill Book Company, New York, NY.

INVENTORY MANAGEMENT, Small Business Administration #75.

STOCK CONTROL FOR SMALL STORES, Small Business Administration, #123.

22.0 **COMPETENCY:** Purchases merchandise for resale.

22.4 **TASK:** Places routine orders.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given information on needed merchandise, and an appropriate order form,

EVALUATION: places routine orders.

STANDARD: All required information is included on the order; correctly, and is in the correct space.

STUDENT LEARNING EXPERIENCES:

1. Describe the concept of "open to buy".
2. Determine "open to buy".
3. Describe the factors involved in determining optimum order quantity.
4. Determine optimum order quantity.
5. Determine appropriate vendor, cost, and terms for given merchandise.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Produce sufficient blank order forms from company to provide one per student per day. Each day, during course of instruction, provide each participant with information related to sales, ads, storage allowances, etc. Participants turn in routine orders as they are necessary.

2. Develop actual bin area and selling area. Allow participants to place routine orders based on actual inventory count be a real product.

3. Give participants information related to maximum and minimum inventory allowed, delivery time, etc. Then, provide information related to wholesaler's discounts for quantity shipments. Require participants to figure the most economical amounts to order, without risking inventory shortages or overages.

4. Break class into groups. Each group develops a routine order form for use in class. For designated periods of time, require entire class to use one of the forms, as a routine order form. At end of project, critique each form.

5. Use developed routine order form for school store and/or fund raising projects.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Appropriate forms.

2. Newspaper ads.

3. Large "bin" area.

4. Store order forms.

RESOURCES:

Carlo, Patrick A., MERCHANDISING MATHEMATICS, Delmar Publishers, Albany NY. 1973.

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, New York, NY. 1978.

Everard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT South-Western Publishing Company, Cincinnati, OH. Chap. 8. 1979.

Lynch, Richard L., INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. p. 256. 1984.

Mason, Ralph E., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. 1982.

Poe, Roy W., GETTING INVOLVED WITH BUSINESS, McGraw-Hill Book Company, New York, NY. Chapter 14. 1981.

Samson, Harland W., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. pp. 64-69. 1974.

Stull, William A., Roger W. Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. 1986.

Stull, William A., MARKETING MATH, South-Western Publishing Company, Cincinnati, 1985.

Warmke, R.F., PRINCIPLES OF MARKETING, South-Western Publishing Company, Cincinnati, OH. Chap. 7. 1985.

22.0 **COMPETENCY:** Purchases merchandise for resale.

22.5 **TASK:** Completes purchase orders.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a blank purchase order and information on vendor and merchandise needed,

EVALUATION: completes a purchase order.

STANDARD: Purchase order number, date, vendor's name and address, shipping or delivery instructions, date of desired delivery, terms of sale, description of merchandise, and appropriate signatures are correct and in the right place.

STUDENT LEARNING EXPERIENCES:

1. List all of the type of information needed on a purchase order.
2. Define trade discount and show what it might look like in written form.
3. Explain how to write shipping information - F.O.B., etc.
4. Explain how to write terms, for example 2/10, net 30.
5. TYPE a purchase order.
6. Compare written information against purchase order to find any discrepancies.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide blank P.O,'s to class. Fill out P.O., using information you provide.
2. Develop a written test requiring a list of all the types of information needed on a P.O.
3. Simulate a phone call to someone in class. Let everyone "listen in", and fill out a P.O. based on information from phone conversation.
4. Provide copies of an invoice and P.O. with various discrepancies. Require each individual to find discrepancies.
5. Develop a written test on terms: shipping information, dating methods.
6. Discuss elements of a contract, and explain why a P.O. would constitute a contract.
7. Help students use a blank P.O. to order items for school store or for fund raising items.
8. Have bookstore representative discuss P.O.'s used by school.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Blank P.O.'s.

RESOURCES:

Carlo, Patrick A., MERCHANDISING MATHEMATICS, Delmar Publishers, Albany NY. 1973.

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, NY. (Page 71). 1978.

Everard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT, South-Western Publishing Company, Cincinnati, OH. p. 142. 1979.

Mason, Ralph E., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. p. 494. 1982.

Moffitt, Carol Willis, THE RECOVERING, CHECKING, MARKING, CLERK, McGraw-Hill Book Company, New York, NY. 1980.

Poe, Roy W., GETTING INVOLVED WITH BUSINESS, McGraw-Hill Book Company, New York, NY. p. 113-114 and 209-210. 1981.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. p. 471-472. 1987.

Stull, William A., Roger W. Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. 1986.

Tyler, Elias S., MATERIALS HANDLING, McGraw-Hill Book Company, New York, NY.

22.0 **COMPETENCY:** Purchases merchandise for resale.

22.6 **TASK:** Develops a system of retail buying and merchandising.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a real or proposed new retail business,

EVALUATION: develops a system of retail buying and merchandising.

STANDARD: System developed complements store goals and includes the following:

A. Type of merchandise control to be used.
B. Policies on merchandise assortments, (pertaining to quality, exclusiveness, variety, and timing.)
C. Merchandise plan which describes planned sales inventory, purchases, expenses, and mark-up for a certain period.
D. Basic stock plan and/or model stock list.
E. Criteria for selecting resources.

STUDENT LEARNING EXPERIENCES:

1. Describe the types of merchandise control and how each is used.

2. Describe the criteria for determining merchandise assortments (quality, exclusiveness, variety and timing.)

3. Describe the process for developing merchandise plans for specific products, lines or departments.

4. Describe the basic stock plan and the model stock plan.

5. Describe the criteria for selecting vendors and other resources.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Use one day per week to work on a business development project in groups using related instruction taught up to that point.
2. Class or group trip to a shopping counter to acctually carry out a marketing research survey to find customer preferences.
3. Class or group trip to a trade show to identify possible new merchandise.
4. Procure actual perpetual inventory sheets from a store and require individuals to figure turnover rates.
5. Meet, if possible, at a store for an extended period, and observe stores system for buying and merchandising.
6. For a group whose limitations preclude such involvement necessary to develop a system for buying and merchandising, simplify a system and present it, step by step, using overhead projector, guest speakers, and no more than one or two products.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Notebooks (loose leaf).

RESOURCES:

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, New York, NY. 1978.

Everard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT, South-Western Publishing Company, Cincinnati, OH. Unit 3. 1979.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. Unit 7, 13, 19. 1982.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. Unit 4. 1987.

Samson, Harland W., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, , Cincinnati, OH. 1974.

Stull, William A., Roger W. Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. Units 3 and 4. 1986.

Tyler, Elias S., MATERIALS HANDLING McGraw-Hill Publishing Company, New York, NY.

MARKETING PLANNING GUIDELINES, SBA-MA#194

22.0 **COMPETENCY:** Purchases merchandise for resale.

22.7 **TASK:** Identifies and selects vendors.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given type and quantity of desired merchandise and means of identifying vendor resources,

EVALUATION: identifies and selects vendors.

STANDARD: Vendors selected are appropriate when compared to other potential vendors, based on suitability, completeness, prices, speed of delivery, credit terms, quality, reputation, quantity, profit potential, return policies, promotional material provided. Flexibility and accessibility may be evaluated.

STUDENT LEARNING EXPERIENCES:

1. Define vendor.
2. Identify important components in selecting a vendor.
3. Compare terms offered. Demonstrate how to figure terms, such as 2/10, net 30.
4. Define display allowance.
5. Prepare a resource file.
6. Develop a resource checklist to aid in making comparisons among possible resources.
7. Develop a ranking sheet and evaluate several vendors using the ranking sheet.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Call local vendors and buyers to arrange guest speakers and field trips.

2. Test market competing products for possible fund raising activity or school store (ex: coke vs pepsi).

3. Assist class in developing ranking list and require students to ask competing retailers to rate it least 2 competing vendors.

4. Using rating sheet, require each individual to rank past fund raising vendors.

INSTRUCTIONAL EQUIPENT, MATERIALS, AND SUPPLES:

1. Product form vendors.

2. Appropriate forms.

RESOURCES:

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, New York, NY. 1978.

Everard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT, South-Western Publishing Company, Cincinnati, OH. Chap. 8. 1979.

Mason, Ralph W., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. 1982

Poe, Roy W., GETTING INVOLVED WITH BUSINESS, McGraw-Hill Book Company, New York, NY. Chapter 7. 1981.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. Chapter 24. 1987.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. Chapter 4. 1974.

Stull, William A., Roger W. Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. Chapter 14. 1986.

Stull, William A., MARKETING MATH, South-Western Publishing Company, Cincinnati, OH. 1985.

Warmke, R.F., PRINCIPLES OF MARKETING, South-Western Publishing Company, Cincinnati, OH. 1985.

PRICING

23.0 COMPETENCY: Establishes the selling price for products/services.

23.1 TASK: Develops a pricing strategy for a product or service.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific product or service and specific company objective,

EVALUATION: develops an appropriate pricing strategy.

STANDARD: Chosen strategy is able to accomplish specific organizational objectives.

STUDENT LEARNING EXPERIENCES:

1. List and discuss reasons for establishing price policies.
2. Describe the four major categories of pricing objectives (profit, volume, competition, prestige).
3. Categorize various company goals into specific types of pricing objectives.
4. Define skimming and penetration pricing.
5. Explain the relationship between a firm's market share and its return on investment.
6. Explain relationship between price and customer perception of quality.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Using a fund-raising product as an example, break into groups and discuss/debate price strategy for marketing the product, with highest profit being group goal.

2. Have one group develop pricing strategy if the primary goal is volume, and another with the primary goal being to compete with a group selling the same product at the same time at the same school.

3. Require students to bring a consumer good to school. Each participant polls classmates to find the price range they would be willing to pay for the good.

4. Give each student/employee an equal amount of play money. Given choices of similar line products, demonstrate how pricing affects demand.

5. Develop a real or imaginary service. Each student/employee must determine what they would be willing to pay for the service. Develop a pricing strategy from accumulated information.

6. Group discussion on reasons why odd pricing is often used at some stores, while rounded-off prices (such as .50 candy bars) are more often used in fund raising sales.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Interview questionnaire.

2. Play money.

3. Consumer products.

RESOURCES:

Boone, Louis E., CONTEMPORARY MARKETING, Dryden Press, New York, NY. Chapter 16. 1985.

Ely, Vivien King, STARTING YOUR OWN MARKETING BUSINESS, McGraw-Hill Book Company, New York, NY. Chapter 4. 1978.

Hutt, Roger W., CREATING A NEW ENTERPRISE, South-Western Publishing Company, Cincinnati, OH. pp. 89-91. 1982.

Lynch, Richard L., INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. pp. 300-304. 1984.

Mason, Ralph E., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw Hill Book Company, New York, NY. pp.205-210. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. 1982.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. Chapter 26. 1987.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. pp. 72-84 . 1974.

Stull, William A., MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. pp. 310-315. 1986.

Warmke, R.F., PRINCIPLES OF MARKETING, South-Western Publishing Company, Cincinnati, OH. Chapter 7. 1985.

23.0 **COMPETENCY:** Establishes the selling price for products/services.

23.2 **TASK:** Computes break-even points.

PERFORMANCE OBJECTIVES:

CONDITIONS: Given information on fixed costs, operating costs, labor, product costs, and profit,

EVALUATION: Computes break-even points.

STANDARD: Determination of break-even point with 99% accuracy.

STUDENT LEARNING EXPERIENCES:

1. Define break-even point.
2. Write correct formula for computing break-even point.
3. Define target returns.
4. Define modified break-even concept.
5. Explain how determining the break even point can assist in price determination.
6. Design a graph to illustrate the break even point for a product, given variable costs, fixed costs, and/or a target return.
7. Explain why a modified break even analysis is superior to the basic model.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Written instructional tests giving fixed costs and variable costs for several items. Require break even point be found for more than one possible price.

2. Break into groups. For competition, select one member of each group to work at chalkboard. Given fixed costs and variable costs for an item, give each participant a different sales price for which a break even point must be found.

3. Given demand at various prices, require teams to identify most profitable pricing to use, using break even chart as reference.

4. Using a group fund raising activity as an example, break into groups to develop a modified break even analysis, given three or more possible selling prices.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Graph paper.

RESOURCES:

Boone, Louis E., CONTEMPORARY MARKETING, The Dryden Press, New York, NY. pp. 479-484. 1985.

Ely, Vivien King, STARTING YOUR OWN MARKETING BUSINESS, McGraw-Hill Book Company, New York, NY. pp. 93-94, 107. 1978.

Lynch, Richard L. INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. pp. 321-322. 1984.

Mason, Ralph E., MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. pp. 195-196. 1986.

Warmke, R. F., PRINCIPLES OF MARKETING, South-Western Publishing Company, Cincinnati, OH. pp. 132-135. 1985.

23.0 **COMPETENCY:** Establishes the selling price for a product/service.

23.3 **TASK:** Determines selling price.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given information on product cost, desired mark-up and company policies,

EVALUATION: determines selling price of product or service.

STANDARD: Price will be accurate +/- 2%.

STUDENT LEARNING EXPERIENCES:

1. Determine correct selling price of an item(s) using retail method, given cost and mark-up percent.
2. Determine correct selling price of an item(s) using cost method, given cost and mark-up percent.
3. Determine correct "initial" mark-up of an item(s) using initial mark-up formula.
4. Determine selling price of an item(s) given restricted number of price classes and guidelines (price lining)
5. Determine selling price of an item(s) given "odd pricing" guidelines.
6. Determine selling price for "units" and fractions, given selling prices. (Example: 3 for $1.49 or $5.00 per pound).
7. Determine equivalent percentage of cost given desired margins as percent of selling price.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Individual written test problems for basic forms of mark-up, giving 2 of three elements. For example: using retail price mark-up method, what is retail price if mark-up is 40% and cost is $4.00.

2. Involve class in competitive game, answering mark-up problems on chalkboard.

3. Divide into groups to solve pricing word problems, given operating expenses, labor costs, profit, and cost percents desired. Use case problems.

4. Develop "businessess" which compete within class and determine pricing on the products. Then sell to each other.

5. Have individuals interview a small business owner to ask them to describe methods they use to set prices for their products.

6. Using newspaper ads, discuss conditions which would almost demand that mark-up on some store items would often be less than normal store mark-up.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Product examples.

2. Newspaper ads.

RESOURCE:

Boone, Louis E., CONTEMPORARY MARKETING, The Dryden Press, New York, NY. pp. 490-515. 1985.

Dorr, Eugene, MERCHANDISING, McGraw-Hill Book Company, New York, NY. 1978.

Everard, Kenneth E., BUSINESS PRINCIPLES AND MANAGEMENT, South-Western Publishing Company, Cincinnati, OH. pp. 188-199. 1979.

Lynch, Richard L., INTRODUCTION TO MARKETING, McGraw-Hill Book Company, New York, NY. pp. 300-330. 1984.

Mason, Ralph E., Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw Hill Book Company, New York, NY. Unit 6. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw Hill Book Company, New York, NY. Chapter 41. 1982.

Samson, Harland E., SELECTING AND BUYING MERCHANDISE, South-Western Publishing Company, Cincinnati, OH. pp. 72-84. 1974.

Samson, Harland E., RETAIL MERCHANDISING, South-Western Publishing Company, Cincinnati, OH. 1987.

Stull, William A., Roger W. Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cincinnati, OH. pp. 310-315. 1986.

Warmke, R. F., PRINCIPLES OF MARKETING, South-Western Publishing Company, Cincinnati, OH. pp. 124-140. 1985.

PSYCHOLOGICAL PRICING, IDECC, PI-001-58. Columbus, OH.

SELLING

24.0 **COMPETENCY:** Sells a product or service.

24.1 **TASK:** Determines and uses customer needs and buying motives.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product, service and/or product information and a selling situation.

EVALUATION: determines the customers needs and buying motives.

STANDARD: Role-playing customer expresses satisfaction when shown a suggested product to fulfill buying motives.

STUDENT LEARNING EXPERIENCES:

1. Define buying motives and patronage motives.
2. Identify various types of buying motives.
3. Explain Maslow's hierarchy.
4. Differentiate between needs, and wants.
5. Match features and benefits of products/services with customer motives.
6. List questions to ask the customer to clarify buying motives.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present samples of customer buying motives by questioning students on why they buy certain products or services.
2. Using a product or service, differentiate various buying motives by indicating different reasons customers may buy the same product or service.
3. Using a product or service, discuss the product information and how this information relates to customer buying needs and wants.
4. Discuss questioning strategies by providing examples of open and closed questions.
5. Have students list reasons they may buy a new car or stereo. Solicit verbal response and differentiate various motives for the same product.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sample of product/service with product information.

RESOURCES:

Ditzenberger Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinnati, OH. pp. 67-84. 1986.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, New York, NY. pp. 82-90. 1986.

SE-114-CS "QUESTIONING" IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

SE-102, 9 SP, "USING BUYING MOTIVES" IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

XEROX Learning Systems, PROFESSIONAL SELLING SKILLS. XEROX Corporation, Greenwich, CT. 1976.

24.0 **COMPETENCY:** Sells a product or service.

24.2 **TASK:** Uses an appropriate greeting and opening statement for the sales presentation.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product/service or product information, and a selling situation,

EVALUATION: uses an appropriate greeting and opening statement for the sales presentation.

STANDARD: Greeting statement opens the sales conversation in a manner which builds positive involvement of customer.

STUDENT LEARNING EXPERIENCES:

1. Explain importance of appropriate greeting in a selling situation.
2. Describe the characteristics of an effective greeting.
3. Describe the use of a service, greeting, merchandise, and complimentary approach.
4. Describe the appropriate greeting for specific sales situations.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present samples of approaches in a class discussion.
2. Using a product/service or product information, have students write examples of various approaches.
3. Using a product information, have students role play various approaches in small groups.
4. Have an approach contest. Give students a mock selling situation and have groups compete with one another to develop the most creative approaches for a particular product/-service.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Product/service or product information.

RESOURCES:

Ditzenberger, Roger, and John Kidney. SELLING: HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinnati, OH. pp. 107-17. 1986.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, New York, NY. pp. 356-8. 1986.

SE-101-CS, "OPENING THE SALE", IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

24.0 **COMPETENCY:** Sells a product or service.

24.3 **TASK:** Uses product/service information obtained with the item.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product/service and a selling situation,

EVALUATION: uses product/service information from sources on/with the item.

STANDARD: Role-playing customer is satisfied with level of information obtained from salesperson.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of product/service knowledge in a selling situation.
2. List sources of product/service information.
3. Differentiate between features and benefits.
4. Translate product features into customer benefits.
5. Identify selling words and phrases.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. In a class discussion, have students contrast effective and ineffective salespeople. List characteristics of each, side by side, on chalkboard and discuss.
2. Using a product or service, list product/service features found on box, wrapper, brochure, etc. Translate these features into benefits.
3. Create a list of product features on paper. Have students translate features into benefits. Discuss.
4. Have students select a product/service or product information found at home and make a list of features and benefits for that item. Have students demonstrate features/benefits and sources of information.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Video camera, recorder and monitor.
2. Product or service.

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, New York, NY. pp. 358-60. 1986.

Ditzenberger, Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinnati, OH. pp. 87-103, 146-61, 175-8. 1986.

SE-104-CS, "PRODUCT INFORMATION FROM MERCHANDISE," IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

24.0 **COMPETENCY:** Sells a product or service.

24.4 **TASK:** Properly handles and demonstrates the product/service.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product/service in a selling situation,

EVALUATION: properly handles and demonstrates the product/service.

STANDARD: Student handles product respectfully as determined by observation of product treatment.

STUDENT LEARNING EXPERIENCES:

1. Explain importance of proper merchandise handling.
2. Demonstrate steps in presenting a product/service.
3. Explain relationship between positive customer impression of product/service, and the salesperson's handling of that product.
4. Demonstrate proper merchandise handling.
5. Describe the techniques for presenting and demonstrating a service, rather than a product.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Simulate poor merchandise handling and have students create a list of what was improper and alternatives.

2. In a class discussion, emphasize the importance of good salespersonship in dealing with the customer. Stress customer and product respect.

3. Using a product, demonstrate proper merchandise handling, highlighting the need for rehearsing the demonstration. Use video recording to provide students feedback.

4. Have students bring in a product and role play proper merchandise handling in small groups.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Video camera, recorder and monitor.

2. Product/service and product information.

RESOURCES:

Ditzenberger, Roger and John Kidney. SELLING HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinnati, OH. pp. 170-9. 1986.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, New York, NY. pp. 358-63. 1986.

SE-103 CS, "PRODUCT DEMONSTRATION", IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

24.0 **COMPETENCY:** Sells a product or service.

24.5 **TASK:** Emphasizes customer benefits in presenting product features.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given a product/service or product information.
EVALUATION:	emphasizes customer benefits when presenting product/service features.
STANDARD:	Each product/service feature mentioned is translated into at least one specific customer benefit.

STUDENT LEARNING EXPERIENCES:

1. Identify customer buying motives for a specific product/service.
2. Identify the features of a specific product/service.
3. Identify customer benefits for each product/service feature.
4. Match features and benefits on product information.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. In a class discussion, question students on the reason they purchase products/services.
2. Using a product/service or product information, compare and contrast physical characteristics to potential benefits for the customer.
3. Using a group of products/services or product information sheets, have students identify features and benefits in small groups.
4. Discuss various sources of product information, stressing their importance to a salesperson's ability to sell.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Products/services or product information sheets.

RESOURCES:

Ditzenberger, Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinnati, OH. pp. 148-161. 1986.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, New York, NY. pp. 358-60. 1986.

SE-113 CS, "FEATURE-BENEFIT SELLING", IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

XEROX Learning Systems, PROFESSIONAL SELLING SKILLS. XEROX CORPORATION, Greenwich, CT. 1976.

24.0 **COMPETENCY:** Sells a product or service.

24.6 **TASK:** Involves the customer in the sales presentation.

PERFORMANCE OBJECTIVE:

CONDITIONS: Using a product/service or product information,

EVALUATION: involves the customer in the sales presentation.

STANDARD: Customer is involved in a sales presentation as evidenced by actually handling product and asking questions.

STUDENT LEARNING EXPERIENCES:

1. Explain how the five senses can be used in a sales presentation.
2. Define sense of ownership.
3. Differentiate between product features and customer benefits.
4. Demonstrate techniques for encouraging the customer to hold, wear, operate or examine a product.
5. Use visual aids and other devices in a sales situation.
6. Use question to seek customer agreement on minor points and to get feedback.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. In a class discussion, build a sales presentation by questioning students on what should happen after customers needs have been established.

2. Using a product/service and product information, demonstrate showmanship to the class by simulating a product presentation. Have a student role play the customer and involve student by asking agreement questions and using product.

3. Using a list of products/services, have students create a series of selling aids.

4. In small groups, have students role play product/service demonstrations and share one from each group with the class.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Video camera, recorder and monitor.

RESOURCES:

Ditzenberger, Roger, John Kidney. SELLING: HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinatti, OH. pp. 170-9. 1986.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, New York, NY. pp. 358-63. 1986.

SE-103-CS, "PRODUCT DEMONSTRATION", IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

24.7 **TASK:** Listens to and answers customer objections and/or complaints.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given a product/service and a selling situation,
EVALUATION:	listens to and answers customer objections and/or complaints.
STANDARD:	Student responds to each objection/complaint to the satisfaction of the customer.

STUDENT LEARNING EXPERIENCES:

1. Define customer objection.
2. Explain why customer objections should be anticipated by a salesperson.
3. Differentiate between objections and excuses.
4. Describe specific techniques for answering objections.
5. Describe how objections can be used to close a sale.
6. Answer customer objections for specific products and services.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. In a class discussion ask, "Why should salespeople welcome customer objections?" List and discuss.
2. Provide students with a list of products/services. Have them identify possible objections and methods of handling objections.
3. Break students into groups. Providing groups with a list of objection handling methods, have each group discuss one method and present to class.
4. Role play a series of customer objections and salesperson objection handling.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Ditzenberger, Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinnati, OH. pp. 181-204. 1986.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, New York, NY. pp. 360-1. 1986.

SE-106-CS, "HANDLING CUSTOMER COMPLAINTS", IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

SE-100-SP, "HANDLING OBJECTIONS", IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

24.0 **COMPETENCY:** Sells a product or service.

24.8 **TASK:** Closes the sale.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product/service in a selling situation,

EVALUATION: closes the sale.

STANDARD: Customer purchases product or service and expresses satisfaction with buying decision.

STUDENT LEARNING EXPERIENCES:

1. Define close.
2. Describe buying signals.
3. Recognize buying signals in a sales situation.
4. Identify and explain various closing techniques.
5. Describe a natural close.
6. Develop closing statements for specific selling situations.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. In a class discussion, have students identify salsesperson with whom they have liked doing business. Solicit reasons.
2. Using a student as a customer, role play a premature closing, and explain the right and wrong ways of handling the close.
3. Relate how the previous steps of a sale should lead to a natural close.
4. Using a list of closing techniques, role play each, identifying appropriate times for their use. Videotape closing techniques.
5. In small groups, have students role play various closing techniques.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Video camera, recorder and monitor.

RESOURCE:

Ditzenberger, Roger and John Kidney. SELLING, HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinnati, OH. pp. 206-228. 1986.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES. cGraw-Hill Book Company, New York, NY. pp. 360-3. 1986.

SE-107-SP, "CLOSING SALES", IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

24.9 TASK: Uses suggestion selling and trading up.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product/service and selling situation,

EVALUATION: uses suggestion selling and trading up.

STANDARD: Role playing customer buys additional related items or an additional quantity.

STUDENT LEARNING EXPERIENCES:

1. Explain reasons suggestion selling can be of value to the customer.
2. Describe ways suggestion selling increases store profit.
3. Define trading up.
4. Explain how to provide the customer with reassurance.
5. Describe suggestion selling techniques.
6. Describe specific merchandise/service suggestions for selling situations.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. In a class discussion, set up a scenerio of a customer who buys a flashlight, leaves the store and returns upset because he had no batteries. Relate suggestion selling as a way to help customers.
2. Providing a list of items, have students create a list of suggested items to go with this list. Discuss.
3. Provide students with a step-by-step suggestion selling process, and have students role play salesperson and customer.
4. Illustrate how suggestion selling increases store profit on a chalkboard or handout. Have students practice with a list of items with suggestion selling dollars and without. Differentiate in a class discussion.
5. Explain importance of reassurance to store image and return business.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Ditzenberger, Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinatti, OH. pp. 231-50. 1986.

Evans & Berman, ESSENTIALS OF MARKETING. McMillan Publishing, New York, NY. pp. 340-6. 1984.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. pp. 361-3. 1986.

SE-110-SP, "USING SUGGESTION SELLING", IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

25.0 COMPETENCY: Performs sales supporting activities.

25.1 TASK: Determines the role of selling in the businesses.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of small businesses,

EVALUATION: determines the role of selling in the businesses.

STANDARD: Student classifies different types of small businesses and identifies role of selling in each.

STUDENT LEARNING EXPERIENCES:

1. Define personal selling.
2. Define full-serve and self-serve.
3. Define customer service.
4. Identify and explain the seven steps of a sale.
5. Differentiate products/services requiring self/full service selling.
6. Describe the criteria for determining the role of selling in a business.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Using different types of products, question students on how much customer assistance is needed when they buy each type of product or service.

2. In small groups, have students list product information needed for a particular product or service and share with class. Distinguish between those product/services which may require various levels of customer assistance.

3. Have students create on paper their ideal perception of what customer service should be, and question students on their answers.

4. Create a chart of the seven steps of the sale and discuss each, sequentially with students.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Ditzenberger, Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY, South-Western Publishing Company, Cincinnati, OH. pp. 12-27, 51-65. 1986.

Bodle, Yvonne and Joseph Corey, RETAIL SELLING, Gregg/McGraw-Hill Book Company, New York, NY. pp. 14-24, 208-16. 1977.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. pp. 346-53. 1986.

25.0 **COMPETENCY:** Completes sales supporting activities.

25.2 **TASK:** Maintains and uses a customer and client list.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a selling situation, information on specific customers, and sales information,

EVALUATION: maintains and uses a customer and client list.

STANDARD Student creates a client list, records ongoing transactions and identifies clients which could be contacted for specific future purchases.

STUDENT LEARNING EXPERIENCES:

1. Define customer/client list.
2. List reasons for maintaining customer/client lists.
3. Explain important questions to ask customers in creating a customer/client list.
4. Identify appropriate times to contact customers.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss prospecting and follow up with the class, comparing the two and pointing out similarities in building a strong customer/client list.
2. Identify a service business, such as a carpet cleaner, pool maintenance company or styling salon, and discuss how important a customer/client list can be to profit.
3. Develop a mock retail situation with a schedule of sales/events. Have students identify how the use of a customer client list can increase sales.
4. In groups, have students identify qualifying questions to place a customer/client information card. Have one representative from each group share their list of questions.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Mock retail situation/schedule of events.
2. Customer/client information card.

RESOURCES:

Ditzenberger, Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY. South-Western Publishing Company, Cincinnati, OH. pp. 119-131. 1986.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw Hill Book Company, New York, NY. pp. 351-8. 1986.

25.0 **COMPETENCY:** Completes sales supporting activities.

25.3 **TASK:** Handles customer inquiries.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of selling and non-selling situations,

EVALUATION: handle customer inquiries.

STANDARD: Customer is satisfied with information given and customer service image of the business is enhanced.

STUDENT LEARNING EXPERIENCES:

1. Define and describe customer service.
2. Explain importance of customer satisfaction to the continued success of the business.
3. Describe methods in handling customer inquiries.
4. Answer customer inquiries regarding merchandise, services and policies.
5. Describe the steps in handling telephone inquiries.
6. Answer telephone inquiries regarding business hours, location, policies and other topics.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. In a class discussion, question studednts on times they called a business and were mistreated. Differentiate between proper phone procedures and inappropriate ones.

2. Have students write an essay on "What does the 'consumer is king?' mean in a retail situation.?" Have students share responses.

3. Prepare a product information sheet. Have students study sheets and role-play salesperson and customer in seeking information about product/service.

4. On a chalkboard, list the headings "just looking", "undecided", and "decided", and have studens identify ways of handling each type of customer and their questions.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Ditzenberger, Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY, South-Western Publishing Company, Cincinnati, OH. pp. 57-65. 1986.

SE-112-SP, "ADDRESSING INDIVIDUAL NEEDS", IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

25.0 **COMPETENCY:** Completes sales supporting activities.

25.4 **TASK:** Processes mail, telephone and special orders.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of selling situations and appropriate store policies,

EVALUATION: processes mail, telephone and special orders.

STANDARD: Student handles orders in a manner satisfactory to a customer and in accordance with store policy.

STUDENT LEARNING EXPERIENCES:

1. Explain importance of mail, telephone and special orders to business profit.
2. Explain proper procedures for handling mail, telephone and special orders.
3. Identify necessary information for various special orders.
4. Describe procedures for handling layaway sales.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss increase of mail and telephone marketing and relate its impact on business profit.
2. Using product information abut customized products such as kitchen cabinetry clothing, and car service, identify the importance of accurate information in completing a customer order.
3. Providing special order information and a special order form, have students role-play customer and sales person in completing a special order sales transaction.
4. In small groups, have students identify types of businesses which may require special orders.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Telephone.
2. Mail order forms and catalogs.

RESOURCES:

Ditzenberger, Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY, South-Western Publishing, Cincinnati, OH. pp. 253-278. 1986.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. pp. 351-52, 363. 1986.

25.5 **TASK:** Wrap, bag or package products.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given assorted merchandise and wrapping materials,
EVALUATION:	wrap, bag, or package products.
STANDARD:	Packaged product should be wrapped in the appropriate manner, neatly, and carefully, with no damage to the product.

STUDENT LEARNING EXPERIENCES:

1. Identify reasons for proper wrapping, bagging, and packaging.
2. Compare different products and identify methods of preparing for customers.
3. Identify bags according to size and weight capacities.
4. Describe techniques for wrapping and bagging merchandise.
5. Explain steps in preparing and shipping packages.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have students prepare a grocery shopping list. After completion, have students decide what items could be placed together and review.

2. Have each student bring in an item, food, non-food, etc. Supplying various grocery and shopping bags, have students group and bag products according to type, and justify grouping.

3. Create a bulletin board of different bagging/packaging techniques, listing what items could placed in these containers directly on the bags/packages.

4. Have students who work in various businesses present company methods of bagging, packaging, wrapping and shipping.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Bags and packages of various sizes and weight capacities.

2. Products or simulated products to package.

RESOURCES:

Bodle, Yvonne and Joseph Corey. RETAIL SELLING, Gregg McGraw Hill Book Company, New York, NY. pp. 360-369. 1977.

Meyers, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. pp. 232-4. 1982.

SE-105-CS, "PACKAGING/WRAPPING MERCHANDISE," IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

25.0 **COMPETENCY:** Completes sales supporting activities.

25.6 **TASK:** Arranges alterations, delivery, or installation.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product or service requiring special service after the sale, and appropriate policy/procedure,

EVALUATION: arranges alterations, delivery or installation.

STANDARD: Makes necessary arrangements in a manner consistent with established policy/procedure.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of properly completing arrangements for special services after the sale.
2. Identify the necessary components and procedures in arranging alterations of garments.
3. Describe the process for arranging the delivery and/or installation of merchandise.
4. Describe the salesperson's role in following up on special arrangements or dealing with problems in these arrangements.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss the types of garments which may require alteration services, relating the importance of fit to customer satisfaction.
2. Role play the situation of arranging for delivery and installation of a durable good.
3. Have students design a delivery system for a mock business. Have students consider cost, routing and customer convenience.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Forms and procedures for alterations and delivery.

RESOURCE:

Mathisen, Marilyn. APPAREL & ACCESSORIES, Gregg McGraw Hill Book Company, New York, NY. pp. 78-83. 90-93. 1979.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. pp. 229-39.

PROMOTION

26.0 **COMPETENCY:** Plans and constructs merchandise displays.

26.1 **TASK:** Plans and schedules merchandise displays.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product, service, and product information,

EVALUATION: plans and schedules a merchandise displays.

STANDARD: Display theme matches product/service and designated schedule.

STUDENT LEARNING EXPERIENCES:

1. Describe the roles of visual merchandising and display for business.
2. Identify a display theme that is well-suited for a product/service.
3. Explain the importance of display timing, and relationship with seasons, holidays, special events, and store promotions.
4. Develop an appropriate schedule for a display.
5. Explain the importance of management approval in planning displays.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss importance of matching each display with the inage of a store by providing examples of appropriate displays and unappropriate displays for particular store.
2. In small groups, have students design a display theme for a particular occasion (sale, fall, etc.) to include all timelines.
3. Discuss the importance of working with management for display planning. Have students list the possible consequences of poor display theme and scheduling.
4. Supply students with a list of store events and have them plan the timelines and themes for each event. Have students defend their rationale.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Examples of displays (drawings, photographs, slides).
2. List of store events.

RESOURCES:

Samson, Harland, Wayne Little, John Wingate. RETAIL MERCHANDISING: CONCEPTS AND APPLICATIONS, South-Western Publishing Company, Cincinnati, OH. pp. 341-7. 1982.

Samson Harland, Wayne Little. VISUAL MERCHANDISING PLANNING AND TECHNIQUES, South-Western Publishing Company, Cincinnati, OH. pp. 57-63. 1985.

26.0 **COMPETENCY:** Plans and constructs merchandise displays.

26.2 **TASK:** Designs merchandise displays.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product, service, or product information,

EVALUATION: designs a merchandise displays.

STANDARD: Display design reflects consideration of color, balance and proportion.

STUDENT LEARNING EXPERIENCES:

1. Define and illustrate balance and proportion.
2. Explain and illustrate formal and informal balance.
3. Identify primary, secondary and tertiary colors, and effective color combinations.
4. Describe the importance of creativity and originality in display.
5. Describe props and fixtures used in displays.
6. Illustrate standard display arrangements and describe their general application.
7. Evaluate merchandise displays for effectiveness and creativity.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Using visual aids such as photographs, drawings, advertisements or slides, question students on colors used and what these colors are attempting to portray.
2. In small groups, have students create an advertisement with the use of color to sell a product, service or idea, and present this idea to a prospective client.
3. Using visual aids, differentiate various types of display and advertising balance and proportion. Discuss various rationale for different types of balance and proportion.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Visual aids such as photographs, drawings, advertisements, or slides.
2. Display fixtures and props.

RESOURCES:

Carty. VISUAL MERCHANDISING, PRINCIPLES AND PRACTICES, MPC Educational Publishers, New York, NY. pp. 74-78, 80-83. 1982.

Smith, Gary. DISPLAY AND PROMOTION, Gregg/McGraw-Hill Book Company, New York, NY. pp. 57-58, 63-71. 1978.

26.0 COMPETENCY: Plans and constructs merchandise displays.

26.3 TASK: Assembles, maintains and dismantles displays.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a product, display fixture, forms and props,

EVALUATION: assembles, maintains and dismantles displays.

STANDARD: Display is built, maintained and dismantled in accordance with display plan, and within established timelines.

STUDENT LEARNING EXPERIENCES:

1. Identify various types of display arrangements and props used.
2. Identify the steps of display construction.
3. Compare and contrast various display arrangements.
4. Display apparel on mannequins and forms.
5. Display hard line merchandise in appropriate fixtures.
6. Explain safety precautions when constructing displays.
7. Explain the importance of display upkeep.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present examples of display arrangements (drawings, slides, etc.) and question students on the possible purpose of the displays.
2. Using a shadow box, display window, corner of the classroom or paper, have students design displays in teams of three.
3. Discuss various businesses and compare and contrast different display themes to match the projected image of each business.

INSTRUCTIONAL EQUIPMENT, MATERIALS AND SUPPLIES:

1. Drawings, slides, or photographs of display arrangements.
2. Display props, display area, paper and markers.
3. Merchandise (real or simulated).

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. pp. 332-5. 1986.

Samson, Harland, Wayne Little, John Wingate. RETAIL MERCHANDISING CONCEPTS AND APPLICATIONS, South-Western Publishing Company, Cincinnati, OH. pp. 326-337. 1982.

26.0 **COMPETENCY:** Plans and constructs merchandise displays.

26.4 **TASK:** Makes and uses price cards and signs.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given a product or service and access to sign making equipment,
EVALUATION:	makes and uses price cards and signs.
STANDARD:	Completed signs/cards are correct, neat and balanced vertically and horizontally.

STUDENT LEARNING EXPERIENCES:

1. Define show card and price card.
2. Explain the use of price and show cards and signs.
3. Describe the approriate situations to use price cards.
4. Explain the various styles of lettering and their use.
5. Describe the techniques to prepare cards/signs.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Lead a class discussion on the different store signs students recall and question students on whether or not store signs match store image.
2. Have students observe different stores and the types of signs used to include a description of the price, color, size and design.
3. Using a number of mock businesses, have students create signs for particular occasion, event or sale. Have students justify the types of lettering used, color, size and amount of information on each.
4. Present samples of different stores and discuss the look of various signs within the stores.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sign press or similar equipment.
2. Posterboard or construction paper.

RESOURCES:

Carty, VISUAL MERCHANDISING, PRINCIPLES AND PRACTICES, MPC Educational Publishers, New York, NY. pp. 87-105. 1982.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. pp. 380-5. 1982.

Smith, Gary. DISPLAY AND PROMOTION, Gregg/McGraw-Hill, New York, NY. pp. 41-2, 88-9. 1978.

27.0 COMPETENCY: Develops promotional plans.

27.1 **TASK:** Develops a promotional mix for a business or organization.

PERFORMANCE OBJECTIVE:

CONDITIONS:	Given a product, service or business situation,
EVALUATION:	develops a promotional mix for a business or organization.
STANDARD:	The promotional mix describes a selection of strategies which matches the desired target audience.

STUDENT LEARNING EXPERIENCES:

1. Define advertising, publicity and sales promotion.
2. Identify differences between advertising, publicity and sales promotion.
3. Define promotional mix.
4. List advantages and disadvantages of various advertising media.
5. Match appropriate promotional techniques to a product, business or organization.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Using a product, service, business or organization, solicit student responses on how students know about product, service, business or organization. Match student responses to the type of promotion being used.
2. Present samples of different promotional mixes and discuss how each element of the mix adds to the achievement of promotional objectives.
3. In small groups, have students design a promotional mix. Have at least one group design a mix for a product, another a service, another a business, and a service organization.
4. Have students role-play account executives, defending a particular promotional mix for a business.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, New York, NY. pp. 300-6. 1986.

Wray, ADVERTISING SERVICES. Gregg, McGraw-Hill Book Company, New York, NY. pp. 64-71. 1979.

EM-014-SP, "PROMOTIONAL MIX", IDECC, MARK ED. Resource Center, Ohio State University, Columbus, OH.

27.0 **COMPETENCY:** Develops promotional plans.

27.2 **TASK:** Develops an advertising campaign for a small business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a real or hypothetical small business,

EVALUATION: develops an advertising campaign for a small business.

STANDARD: The advertising campaign will contain appropriate media targeted to a particular market within a specified budget.

STUDENT LEARNING EXPERIENCES:

1. Define the target market for a small business.
2. Describe available advertising media.
3. List the advantages and disadvantages of various media.
4. Determine the costs (production and circulation) for advertising media.
5. Differentiate between an effective media mix and an ineffective one.
6. Develop a theme or concept to use as the basis for an advertising campaign.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present samples of products/services/institutions and how they developed a media mix.
2. In small groups, have a students design a media mix for a mock product/service or institution.
3. In small groups, have students prepare a campaign budget for a product/service or institution.
4. Supply students with a list of products, services, or institutions and have them select one best advertising medium and verbally defend their rationale.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Samples of advertising media.

RESOURCES:

Evans and Berman, ESSENTIALS OF MARKETING. MacMillan Publishing Company, New York, NY. pp. 312-32. 1984.

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES. McGraw-Hill Book Company, New York, NY. pp. 317-25. 1986.

MARKETING INFORMATION MANAGEMENT

28.0 **COMPETENCY:** Applies research techniques to marketing decisions.

28.1 **TASK:** Uses problem solving strategies to make decisions.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a marketing/management problem or simulation,

EVALUATION: uses problem solving strategies to make decisions.

STANDARD: The decision made will follow each step in the problem solving process and demonstrate logical conclusions.

STUDENT LEARNING EXPERIENCES:

1. Describe the steps in a scientific problem-solving process.
2. Develop a problem statement or hypothesis for a topic or problem.
3. Define and describe the process of "brainstorming".
4. Determine the advantantages and disadvantages for a list of proposed alternative solutions.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Give students a case study on a management problem. Review decisions made and possible alternatives.
2. Have students work on a simultation software package (see resources). Have students work in groups and compete against one another.
3. Ask Junior Achievement of Arizona to come and sponsor a class. J.A. will provide a computer simulation in conjunction with consultant.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Computer hardware.
2. Computer software simulation.
3. Case study.

RESOURCES:

Mason,Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, Novato, CA. pp. 431-433 (Text Case Study). 1986.

Meyer, Warren, G., Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, 7th Edition, McGraw-Hill Book Company, New York, NY. pp. 423-426. 1982.

GADGETRONICS, South-Western Publishing Company, Cincinnati, OH. (computer simultation).

JEANS FACTORY. Arizona Council on Economic Education, 28.0 **COMPETENCY:** Applies research techniques to marketing decisions.

28.2 **TASK:** Develops a market research plan for a product or service.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a specific product or service,

EVALUATION: develops a market research plan.

STANDARD: The plan should contain a problem statement, findings from secondary research, and a plan for obtaining and analyzing primary research.

STUDENT LEARNING EXPERIENCES:

1. Explain the purposes of marketing research.
2. Explain the steps in completing a marketing research study.
3. Compare the uses of primary and secondary research data.
4. List secondary data sources for marketing research.
5. List and describe the basic primary research techniques and the advantages and disadvantages of each.
6. Analyze a research report and identify the purpose of the study, processes used, and results of the study.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Explain to students the purpose of research plans, show them typical formats and examples of actual research projects.

2. Have groups of students brainstorm for ideas for a research project, such as new markets for products, promotion, trading area facilities, sales, employment, etc.

3. Have groups of students meet with the business people, Chambers of Commerce, and other sources to act as consultants in the conducting of a research plan.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Research projects in final form.

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, Novato, CA. pp. 126-147. 1986.

Stull, William and Roger Hutt. MARKETING: AN INTRODUCTION, South-Western Publishing Company, Cinncinatti, OH. pp. 106-126 (text). 1986.

CREATIVE MARKETING RESEARCH PROJECT, sponsored by the Sales and Marketing Executives International, DECA Guide, Distributive Education Clubs of America, 1908 Association Drive, Reston, VA 22091 pp. 57-64 (project),

29.0 **COMPETENCY:** Uses computers to aid management and decision making.

29.1 **TASK:** Operates a microcomputer or computer terminal.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given access to a microcomputer or computer terminal,

EVALUATION: operates a microcomputer or computer terminal.

STANDARD: The demonstration will include accessing the system, entering data and properly exiting the system.

STUDENT LEARNING EXPERIENCES:

1. Describe how computers are used in business, and the functions they perform.
2. Describe the differences between mainframe computers and personal computers.
3. Identify specific parts and features of a computer system, including CPU, keyboard, display, storage, printers and related peripherals.
4. Describe and demonstrate the use of menus.
5. Describe the operation of a specific computer application by reviewing manuals and reference materials.
6. Enter information for a specific computer application.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have students take a field trip to a business where computers are used. Have them write down the computer features, applications, and skills needed to survive.

2. In small groups, demonstrate to students the skills necessary for the operation of a certain computer and application.

3. Individual students can take turns at the computer manipulating the basic functions and incorporating a specific application such as word processing, spreadsheets, data base, graphics, or a simulation.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Computer hardware.

2. Computer software, particularly business applications and simulations.

RESOURCES:

APPLEWORKS, Apple Computer, Inc., Cupertino, CA. (Computer Application Software for the IIC, IIE). 1983.

MARKETING FUNDAMENTALS, IDECC, Inc., The Ohio State University, Columbus, OH. (Quiz for IIC, IIE, IBM comes in a series of units)

MARKETING PEANUT BUTTER, McGraw-Hill, Novato, CA. (Simulation)

29.0 **COMPETENCY:** Uses computers to aid management and decision making.

29.2 **TASK:** Uses computer data base system to store/retrieve information.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given proper computer hardware and data base software.

EVALUATION: uses computer data base systems to store/retrieve information.

STANDARD: Demonstration will include accessing the system, obtaining information, adding and changing records, and properly exiting the system.

STUDENT LEARNING EXPERIENCES:

1. Define the purposes and use of a data base.
2. Describe business applications of a data base, both large scale and small scale.
3. Define and describe the terms file, record, field, screen, and report.
4. Describe the concepts of sorting and indexing records in a data base.
5. Describe the procedures necessary to update records in a data base file.
6. Enter data and create records for a data base file.
7. Print reports from a data base to meet specific requirements.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Show students examples of data base reports and files including class lists, customer lists, mailing lists, etc. Discuss the need for automation of this data.

2. Take a tour of your school's registrar, or any computerized system, to see data data base systems and components at work.

3. Have each student create and design a data base file for a specific set of business related data (business .list, customer list, ets.).

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Computer hardware, including printer.

2. Computer data base software.

3. Documentation support.

RESOURCES:

APPLEWORKS, Apple Computer Inc., Cupertino, CA. Computer Application Software Program for IIE, IIC. 1983.

APPROACHING MACINTOSH, Addison-Wesley Publishing Company, Menlo Park, CA. pp. 6-2, 6-63 (text). 1986.

Mason, Ralph, Patricia Rath, Stewart Husted and Richard Lynch. MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, McGraw-Hill Book Company, New York, NY. pp. 413-420. 1986.

MICROSTORE INVENTORY PROGRAM, IDECC, Inc., The Ohio State University, Columbus, OH. (Inventory Control Program)

29.0 **COMPETENCY:** Uses computers to aid management and decision making.

29.3 **TASK:** Uses computer spreadsheet software to analyze information.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a previously prepared computer spreadsheet model, marketing data, and a problem statement,

EVALUATION: uses computer spreadsheet software to analyze information.

STANDARD: Data will be properly entered, revisions made appropriate to the problem, and accurate results obtained.

STUDENT LEARNING EXPERIENCES:

1. Describe the purpose and use of electronic spreadsheets.
2. Describe the general functions and operation of electronic spreadsheets.
3. Name and describe current spreadsheet programs and the systems on which they operate.
4. Interpret the results of printed spreadsheets.
5. Enter data and make revisions in electronic spreadsheets

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Using a computer and spreadsheet software, demonstrate to students how a spreadsheet can calculate and make various projections.

2. Give students a Profit Worksheet to plan and create with given amounts. Then give some projected amounts to see what changes are made.

3. Take a field trip to an accounting firm or stock brokerage to see the computer in action with various projections and uses.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Computer hardware including printer.

2. Computer spreadsheet software and documentation.

3. Examples of computer spreadsheets (models) both printed and on disk.

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted, and Richard Lynch, MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 413-420. 1986.

APPLEWORKS, Apple Computer, Inc., Cupertino, CA (Computer Application Software for the IIC, IIE). 1983.

APPROACHING MACINTOSH, A Guide to Learning Macintosh Software Addison-Wesley Publishing Company, pp. 4-2, 4-74. (Spreadsheets for Macintosh). 1986.

PROFIT AND LOSS, McGraw-Hill Book Co., 8171 Redwood Highway, Navato, CA 94947 (single marketing similation). 1982.

29.0 **COMPETENCY:** Uses computers to aid management and decision making.

29.4 **TASK:** Uses computer hardware/software for electronic communications.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the necessary components of a data communications system

EVALUATION: uses computer hardware/software to obtain information.

STANDARD: The correct procedures will be followed in making with the designated information source, disk or hard copy of the requested data will be obtained, and the system will be properly exited.

STUDENT LEARNING EXPERIENCES:

1. Define the components of a data communications network.
2. Define and describe terminology related to data communications
3. Describe the importance of passwords and security systems in data communications
4. Describe on-line information services.
5. Access specific information from an on-line information service.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Show transparencies on a discussion of data communications systems to the class. Point out key topics of the system.
2. Take a field trip to local financial institutions, stock brokerage, or the like to show data communications and electronic communications.
3. Hook up a modem to an existing computer system and communicate electronically with its capability.

INSTRUCTIONAL EQUIPMENT, MATERIAL, AND SUPPLIES:

1. Computer hardware.
2. Computer data communications software.
3. Modem.
4. Data communications channel/telephone.

RESOURCES:

Casady, Mona. WORD/INFORMATION PROCESSING CONCEPTS, South-Western Publishing Company, Cincinnati, OH. pp. 21-39. 1984.

Shelley, Gary, Jan Cashman. INTRODUCTION TO COMPUTERS AND DATA PROCESSING, Anaheim Publishing Company, Anaheim, CA. pp. 8.1-8.35. 1980.

Apple Personal Modem & System, Apple Computer, Inc., Cupertino, CA. (Modem and training support).

29.0 **COMPETENCY:** Uses computers to aid management and decision making.

29.5 **TASK:** Identifies the steps a business should take in obtaining a computer system.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a real or proposed business venture,

EVALUATION: identifies the steps the business should take in obtaining a computer system.

STANDARD: The steps should include the analysis of desired output, software, hardware, vendor qualifications, training and education, service and maintenance support, security, cost.

STUDENT LEARNING EXPERIENCES:

1. List the advantages and disadvantages for a business when a computer system is installed.
2. Describe the elements of a feasibility study.
3. Define and describe the types of computer software, including operating systems, applications, and utilities.
4. Define and describe computer hardware components.
5. Describe the importance of training and support for computer systems.
6. Evaluate cost of hardware, software and support functions.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have students report on the content of an article from a magazine or newspaper that describes a computer application in small business.
2. Visit a retail computer store and prepare a report on the kinds of computers that are available for small business. Collect literature and bring to class.
3. Have a small business owner come who uses a computer explain why the decision was made to use a computer system.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Computer periodicals.

RESOURCES:

Abrahamson, Pickle, SMALL BUSINESS MANAGEMENT, John Wiley and Sons, Inc., New York, NY. pp. 392-414, 1986.

Mason, Ralph, Patricia Rath, Stewart Husted, and Richard Lynch, MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 413-420. 1986.

HOW TO GET STARTED WITH A SMALL BUSINESS COMPUTER, Small Business Administration, P.O. Box 15434, Fort Worth, TX. 76119 (pamphlet).

FINANCE

30. 0 **COMPETENCY:** Performs accounting functions.

30.1 **TASK:** Maintains accounting records for a small business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of transactions for a small business, and a record-keeping system,

EVALUATION: maintains accounting records for a small business.

STANDARD: The transactions are accurately recorded in the journal and posted to the appropriate ledger.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of keeping accurate and current accounting records.
2. Define the concepts of debits and credits.
3. Explain the types of accounts that are used in a typical small business.
4. Prepare and use a general journal.
5. Post journal entries to appropriate ledgers.
6. Evaluate the accuracy of accounting records.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Use overhead projector to review basic principles such as the accounting equation.
2. Have students act as instructor occasionally when reviewing problems to allow them the opportunity to explain the problem in more depth
3. Invite a local small business person to discuss the important items he/she is concerned about in financial record keeping.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Columnar accounting paper.
2. Ten-key calculators.

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted, and Richard Lynch, MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 379-385. 1986.

Meyer, Warren, Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, Seventh Edition, McGraw-Hill Publishing Company, New York, NY. pp. 572-577. 1982.

Swanson, Robert, Kenton Ross, Robert Hanson, Lewis Boynton, CENTURY 21, 3rd edition, South-Western Publishing Company, Cincinnati, OH. 1982.

Swanson, Robert, Kenton Ross, Robert Hanson, Lewis Boynton, FUNDAMENTALS OF ACCOUNTING, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp. 109, 129, 142, 160. 1983.

Weaver, Smiley, Brower And Porreca, ACCOUNTING SYSTEM AND PROCEDURES, 4th edition, Gregg/McGraw-Hill Book Company, New York, NY. 1982.

30.0 **COMPETENCY:** Performs accounting functions.

30.2 **TASK:** Prepares an income statement.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of revenues and expenses for a business operation,

EVALUATION: prepares an income statement.

STANDARD: The title is correctly listed, the revenue, cost of goods sold and expenses are listed to reflect the proper net sales, gross profit, and net income.

STUDENT LEARNING EXPERIENCES:

1. Describe the purpose and importance of the income statement.
2. Describe the proper components of the heading.
3. Differentiate between a revenue, cost of goods sold item, and expense.
4. Describe the components of the cost of goods sold section and calculate cost of goods sold.
5. Place the revenues, cost of goods sold section, and expenses in the proper order.
6. Calculate subtotals and totals accurately.
7. Evaluate example income statements for accuracy in format and calculations.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss the proper title designation for an income statement which includes name of the company, name of the statement and date.
2. Provide practice in calculating cost of goods sold. Keep it simple, at first only using inventories and purchases.
3. In small groups review different actual income statements.
4. Provide exercises that allow the students to do an income statement.
5. Have students regularly prepare income statements for DECA sales projects and activities.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Columnar accounting paper.
2. Ten-key calculators.

RESOURCES:

Meyer, Warren, Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, Seventh Edition, McGraw-Hill Book Company, New York, NY. pp. 572-575. 1982.

Swanson, Robert, Kenton Ross,Robert Hanson, Lewis Boynton, CENTURY 21, 3rd edition, South-Western Publishing Company, Cincinnati, OH. 1982.

Swanson, Robert, Kenton Ross, Robert Hanson, Lewis Boynton, FUNDAMENTALS OF ACCOUNTING, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp. 130-134. 1983.

Weaver, Smiley, Brower, and Porreca, ACCOUNTING SYSTEM AND PROCEDURES, 4th edition, Gregg/McGraw-Hill Book Company, New York, NY. 1982.

30.0 **COMPETENCY:** Performs accounting functions.

30.3 **TASK:** Prepares a balance sheet.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of assets, liabilities, and capital account with corresponding amounts,

EVALUATION: prepares a balance sheet.

STANDARD: The title is listed correctly, the assets are listed on the left side, the liabilities and capital are listed on the right side with the dollar amount on each side being equal.

STUDENT LEARNING EXPERIENCES:

1. Describe the purpose and importance of the balance sheet, and how the balance sheet is used by the business.
2. Differentiate between an asset, liability and capital account.
3. Describe asset accounts and list them in the order of liquidity
4. Describe the types of business liabilities, both short-term and long-term.
5. Define and explain equity.
6. Calculate sub-totals and totals accurately.
7. Evaluate sample balance sheets for accuracy in format and calculation.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss the proper title designation for a balance sheet, which includes name of the company, name of the statement and date.

2. Provide practice in calculating the end of the period capital. Use last year's ending capital balance as the beginning capital balance for the current year, add net income or deduct net loss, and deduct drawing to obtain ending capital balance.

3. Identify account classifications as asset, liability, or capital by the use of computer assisted instruction (referenced). This allows the student an opportunity to designate each account that is placed in a balance sheet. The them the correct answer if they identify the account erroneously.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Columnar accounting paper.

2. Ten-key calculator.

3. Software for computer aided instruction.

4. Microcomputer system.

RESOURCES:

Meyer, Warren, Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, Seventh Edition, McGraw-Hill Book Company, New York, NY. pp. 574-577. 1982.

Swanson, Robert, Kenton Ross, Robert Hanson, Boynton, CENTURY 21, 3rd edition, South-Western Publishing Company, Cincinnati, OH. 1982.

Swanson, Robert, Kenton Ross, Robert Hanson, Lewis Boynton, FUNDAMENTALS OF ACCOUNTING, 3rd edition, South-Western Publishing Company, Cincinnati, OH. pp 134-138. 1983.

Weaver, Smiley, Brower, and Porreca, ACCOUNTING SYSTEM AND PROCEDURES, 4th edition, Gregg/McGraw-Hill Book Company, New York, NY. 1982.

C. A. I. MODULE 1, Funk & Smith, Computer Assisted Introduction to Accounting, CBS College Publishing, 1984.

30.0 **COMPETENCY:** Performs accounting functions.

30.4 **TASK:** Selects an accounting system for a small business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a real or proposed new small business,

EVALUATION: selects an accounting system for that small business.

STANDARD: Decision should be based upon equipment selected, cost of system, allowance for growth, and use by management.

STUDENT LEARNING EXPERIENCES:

1. Describe the basic requirements of an accounting system for a small business.
2. Demonstrate the types of financial statements an accounting system should be able to provide.
3. List a chart of accounts for a specific type of small business.
4. Explain concept of payback periods as it relates to purchase of capital equipment.
5. Describe how computers are utilized to process accounting records.
6. Compare alternative accounting systems, both manual and computerized.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. If the class is small, take a field trip to a small business that uses a computer to do their accounting, Allow the business the opportunity to construct and print financial statements.
2. If the class is large have an in class computer demonstration with accounting software.
3. Have students select and justify a chart of accounts for several diverse small businesses.
4. Discuss how the system can be expanded to provide for future growth with minimal cost.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Micro-computer.
2. Accounting software.
3. Transparencies with alternate chart of accounts for small businesses.

RESOURCES:

Cohen, Jules A., HOW TO COMPUTERIZE YOUR SMALL BUSINESS, Prentice Hall Publishing Company, Englewood Cliffs, NJ. 1980.

Smith, Brian R., THE SMALL COMPUTER IN BUSINESS, Stephen Greene Press, Brattleboro, NH. 1981.

NAT'L. SOCIETY OF PUBLIC ACCOUNTANTS, by Marjorie James, editor, accounting systems and medium sized businessess, Prentice Hall Publishing Company, Englewood Cliffs, NJ. pp 1-8. 1973.

PACE Revised, KEEPING THE BUSINESS RECORDS, Level 1, unit 15, The National Center For Research in Vocational Education, Ohio State University, Columbus, OH. 1983.

PACE Revised, KEEPING THE BUSINESS RECORDS, Level 2, unit 15, The National Center For Research in Vocational Education, Ohio State University, Columbus, OH. 1983.

31.0 **COMPETENCY:** Implements credit procedures.

31.1 **TASK:** Interprets and explains credit policies.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given an established credit policy for a business, and a series of questions/problems related to granting credit,

EVALUATION: interprets and explains credit policies.

STANDARD: Explanation for each question/problem will meet the established guidelines.

STUDENT LEARNING EXPERIENCES:

1. Explain the purpose of credit and how it can benefit the consumer as well as the company.
2. Differentiate a company philosophy on credit policies as to whether it is marketing or accounting oriented?
3. Discuss the 3 C's of credit and how they are used in evaluating credit.
4. Describe the elements of the Consumer Protection Act of 1968 including Regulation Z, the Truth in Lending Act, and the Fair Credit Billing Act
5. Describe the collection process.
6. Write collection letters to be used in a timed sequence for a delinquent account.
7. Describe the credit policies for a given business or organization.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a business person who is employed in banking and finance to discuss loan officers approach to evaluation of the 3 C's of credit and federal laws that effect loans.

2. Invite the Business Communications teachers or a Credit Bureau manager to discuss elements of collection letters.

3. Have individual students compose the first collection letter.

4. In a small class environment, divide into groups of three and have each group compose three collection letters that would be mailed in sequence to a delinquent customer.

5. In a large class environment, divide into groups of 5-8. Assign each group to do a specific collection letter (No. 1, 2, or 3). At the end of the class have each group share their letter with the class.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Pamphlets and brochures on credit laws and procedures, obtained from the Better Business Bureau and similar organizations.

RESOURCES:

Dible, Donald M., BUSINESS STARTUP BASICS, The Entrepreneur Press, Fairfield, CA. 1978.

Mason, Ralph, Patricia Rath, Stewart Husted, and Richard Lynch, MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 395-402. 1986.

Meyer, Warren, Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, Seventh Edition, McGraw-Hill Book Company, New York, NY. pp. 396-399. 1982.

Rosenberg, R. Robert, John E. Whitcraft, and Gordan W. Brown, UNDERSTANDING BUSINESS AND CONSUMER LAW, 6th edition, Gregg/McGraw-Hill Book Company, New York, NY. 1979.

Taylor, John Renford, CONSUMER LENDING, American Banking Association, Washington D.C., pp. 22-23, 204-206. 1983.

PACE Revised, MANAGING CUSTOMER CREDIT AND COLLECTIONS, Level 1, Unit 17, The National Center For Research in Vocational Education, Ohio State University, Columbus, OH. 1983.

PACE Revised, MANAGING CUSTOMER CREDIT AND COLLECTIONS, Level 2, Unit 17, The National Center For Research in Vocational Education, Ohio State University, Columbus, OH. 1983.

31.2 **TASK:** Establishes credit policies for a small business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a new small business,

EVALUATION: establishes credit policies for this business.

STANDARD: Established credit policy will include elements for the type of business as determined by SBA or similar guidelines.

STUDENT LEARNING EXPERIENCES:

1. Explain the advantages and disadvantages of granting credit.
2. Describe current credit practices of a selected industry.
3. Calculate an estimate of the percentage of sales allowable to be on credit.
4. Describe the advantages and disadvantages of using bank credit cards instead of establishing an individual credit system.
5. Develop an appropriate credit application.
6. Explain the importance of character traits, capacity to pay, and capital when evaluating credit worthiness.
7. List sources of collateral to guarantee credit payment.
8. Describe procedures to be followed in dealing with delinquent accounts.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Have the class discuss examples of the three C's of credit.
2. Have questions prepared to submit to the guest speaker. The student should have selected these questions in a prior period.
3. Invite a local business person to speak on credit practices, share trade publication information, and discuss the pros and cons of granting credit.
4. Divide the class into small groups to compose a credit application.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Examples of credit applications.

RESOURCES:

Dible, Donald M., BUSINESS STARTUP BASICS, The Entrepreneur Press, Fairfield, CA. 1978.

Mason, Ralph, Patricia Rath, Stewart Husted, and Richard Lynch, MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 395-403. 1986.

Meyer, Warren, Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, Seventh Edition, McGraw-Hill Book Company, New York, NY. pp. 392-399. 1982.

Rosenberg, R. Robert, John E. Whitcraft, Gordan W. Brown. UNDERSTANDING BUSINESS AND CONSUMER LAW, 6th edition, Gregg/McGraw-Hill Book Company, New York, NY. 1979.

Taylor, John Renford, CONSUMER LENDING, American Banking Association, Washington D.C., pp. 22-23. 1983.

PACE Revised, MANAGING CUSTOMER CREDIT AND COLLECTIONS, Level 1, Unit 17, The National Center For Research in Vocational Education, Ohio State University, Columbus, OH. 1983.

PACE Revised, MANAGING CUSTOMER CREDIT AND COLLECTIONS, Level 2, Unit 17, The National Center For Research in Vocational Education, Ohio State University, Columbus, OH. 1983.

32.0 **COMPETENCY:** Utilizes effective financial management.

32.1 **TASK:** Lists the types of costs involved in starting a new business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the description of a proposed new business,

EVALUATION: lists the types of costs involved in starting a new business.

STANDARD: All items of the checklist "FOR GOING INTO BUSINESS" published by the Small Business Administration are included.

STUDENT LEARNING EXPERIENCES:

1. Explain startup costs.
2. Describe the costs of building, decorating, or remodeling the facility.
3. Describe the cost for initial fixtures and equipment.
4. Describe the process for determining the amount of beginning inventory.
5. List the fees for licenses, permits and registration with local, state, and federal government.
6. Describe expenses for advertising and promotion for the opening.
7. List expected fees for legal and professional assistance.
8. List and describe recurring monthly expenses.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a small business guest speaker to discuss start-up costs, monthly expenses, need for adequate cash flow, taxes, and unexpected costs. Have students compile a list of costs obtained from the guest speakers remarks.
2. Make personal visits as a team or individual to the media to obtain rate structure.
3. Contact the city and county to determine current licensing or taxing costs.
4. Have the guest speaker and/or the advisory committee critique student compilation of costs.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Rate cards for newspaper, radio, television, magazine, billboards, and other media.
2. Federal and state pamphlets on payroll and unemployment taxes, workmen's compensation and related costs.
3. Catalogs with price quotes on furniture, fixtures, and equipment.

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted, and Richard Lynch, MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 380-385. 1986.

Meyer, Warren, Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, Seventh Edition, McGraw-Hill Book Company, New York, NY. pp. 547-551. 1982.

Sullivan, Daniel J., Joseph F. Lane. SMALL BUSINESS MANAGEMENT, William C. Brown Company Publishers, Dubuque IA. pp. 185-195, 480-481.

"CHECKLIST FOR GOING INTO BUSINESS", Small Marketers Aid No. 71, Small Business Administration, Washington D.C., 1972.

PACE Revised, FINANCING THE BUSINESS, Level 1, Unit 8, The National Center For REsearch in Vocational Education, Ohio State University, Columbus, OH. 1983.

PACE Revised, FINANCING THE BUSINESS, Level 2, Unit 8, The National Center For Research in Vocational Education, Ohio State University, Columbus, OH. 1983.

32.0 **COMPETENCY:** Utilizes effective financial management.

32.2 **TASK:** Calculates financial ratios.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a proforma income statement and balance sheet for a real or hypothetical business,

EVALUATION: calculates financial ratios.

STANDARD: Accurately compute current ratio, acid test ratio, inventory turnover, and return on investment and explain the significance of each results.

STUDENT LEARNING EXPERIENCES:

1. Explain the purpose and use of accounting ratios.
2. List and explain the formula for computing Current Ratio, Acid Test Ratio, Inventory turnover, and Return on investment.
3. Calculate ratios for provided data.
4. Compare accounting ratios with industry averages published in trade journals and related sources.
5. Explain the significance of specific accounting ratios

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Assign each class member to put the formula for a ratio on the board and review it.
2. If the class is large, put the formulas on the overhead and assign a calculation to all students, review the results on the overhead before proceeding to the next formula.
3. Provide the proforma statements to all students so they can determine the source of the arithmetic figures.
4. Group students based on areas of interest and allow them to research and discuss the ratios that are typical within a given industry.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Overhead project.
2. Transparencies and marking pencils.
3. Copies of proforma statements.
4. Trade publications which contain industry average ratios.

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted, and Richard Lynch, MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 408-410. 1986.

Meigs, Walter B., Robert F. Meigs. FINANCIAL ACCOUNTING, 5th edition, McGraw-Hill Book Company, New York, NY. 1986.

Meyer, Warren, Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, Seventh Edition, McGraw-Hill Book Company, New York, NY. pp. 565-572. 1982.

Miller, Charles D., Stanley A. Salzman. BUSINESS MATHEMATICS, 4th edition, Scott Foresman and Company, Glenview, IL. 1987.

Sullivan, Daniel J., Joseph F. Lane. "SMALL BUSINESS MANAGEMENT", William C. Brown Company Publishers, Dubuque, IA. pp. 228-239. 1983.

32.0 **COMPETENCY:** Utilizes effective financial management.

32.3 **TASK:** Interprets financial statements.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a current income statement and balance sheet,

EVALUATION: interprets the financial statements as a basis for decisions.

STANDARD: Analysis must include trend analysis, ratio analysis, and percentage analysis.

STUDENT LEARNING EXPERIENCE:

1. Compute a trend analysis for income statments and balance sheets over a designated period of time.
2. Use appropriate formulas to calculate Current Ratio, Acid Test Ratio, Inventory Turnover, and return on investment.
3. Calculate percentage analysis for comparative income statement and balance sheet.
5. Describe how management can use the results of each type of financial analysis.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide each student with a calculator or have them bring their own calculators, work independently at their desk, instructor monitors each student to determine if he/she has the correct answer.
2. In small groups, analyze income statements and balance sheets for specific businesses.
3. Have the class discuss the results of a financial analysis, and interpret the financial position of the business.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Actual or model financial statements.
2. Calculators.
3. Columnar paper and pencil.

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted, and Richard Lynch, MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 404-410. 1986.

Meigs, Walter B., Robert F. Meigs. FINANCIAL ACCOUNTING, Fifth Edition, McGraw-Hill Book Company, New York, NY. pp. 650-674. 1986.

Meyer, Warren, Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, Seventh Edition, McGraw-Hill Book Company, New York, NY. pp. 572-578. 1982.

Pyle, William W., Kermit D. Larson. FINANCIAL ACCOUNTING, Revised Edition, Richard D. Irwin Publishing, Homewood, IL. pp. 543-557. 1983.

32.0 **COMPETENCY:** Utilizes effective financial management.

32.4 **TASK:** Develops and implements a financial management plan.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a new small business venture,

EVALUATION: develops and implements a financial management plan.

STANDARD: Sources of funds have been identified to allow continued operation of the business without jeopardizing short term or long term assets according to generally accepted ratios and guidelines.

STUDENT LEARNING EXPERIENCES:

1. Determine the cash needs for a new business.
2. Define and describe equity capital.
3. Describe the three "c's" and how they effect a borrower.
4. Explain when short term loans should be solicited.
5. Describe trade credit.
6. Compare line of credit and revolving credit.
7. List restrictions when borrowing from the Small Business Administration.
8. State requirements when borrowing from the Economic Opportunity Loan or the small business investment companies.
9. List the advantages of the sale and lease-back method of financing property.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Role play a loan officer and a client. Use prepared questions to obtain financial information.
2. Identify criteria in establishing "character".
3. Invite a representative of the Small Business administration to describe the criteria for obtaining a loan.
4. Assign individuals or a group of individuals the task of defining terms that relate to this subject.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted, and Richard Lynch, MARKETING PRACTICES AND PRINCIPLES, Fourth Edition, Gregg/McGraw-Hill Book Company, New York, NY. pp. 404-412. 1986.

Meyer, Warren, Peter Haines, E. Edward Harris, RETAILING PRINCIPLES AND PRACTICES, Seventh Edition, McGraw-Hill Book Company, New York, NY. pp. 572-578. 1982.

Sullivan, Daniel J., Joseph F. Lane. "SMALL BUSINESS MANAGEMENT", William C. Brown Publishers, Dubuque, IA. pp. 126-137. 1983.

PACE Revised, FINANCING THE BUSINESS, Level 1, Unit 8, The National Center For Research in Vocational Education, Ohio State University, Columbus, OH. 1983.

PACE Revised, FINANCING THE BUSINESS, Level 2, Unit 8, The National Center For Research in Vocational Education, Ohio State Univeristy, Columbus, OH. 1983.

RISK

33.0 **COMPETENCY:** Minimizes business risk and losses.

33.1 **TASK:** Follows safe work practices.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a real or simulated business situation, and a designated period of time,

EVALUATION: follows safe work practices.

STANDARD: On observation throughout the designated time period, there are no unsafe work practices.

STUDENT LEARNING EXPERIENCES:

1. Match terms associated with store safety to their correct definitions.
2. List the major causes of on-the-job accidents.
3. List ways to create a safe and healthy workplace.
4. Discuss employer responsibilities regarding OSHA.
5. Complete a retail store safety check.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite the local fire department to demonstrate how to use fire extinguishers and ways to protect life and property from fire.
2. Contact local fire department for film on fire prevention.
3. Ask the athletic department or nurse at your school to provide basic training in first aid.
4. Use transparencies to illustrate how to lift heavy items, types of fire extinguishers.
5. Invite an OSHA representative to discuss employer's responsibilities and recordkeeping.

INSTRUCTIONAL EQUIPMENT MATERIALS, AND SUPPLIES:

RESOURCES:

Fallek, Max, HOW TO SET UP YOUR OWN SMALL BUSINESS, American Institute of Small Business, Vol. II, Washington, DC. p. 13.4-13.5. 1987.

Lyon, Barbara Jean, BUSINESS MANAGEMENT AND OWNERSHIP, Oklahoma State Board of Educ., Stillwater, OK. pp. 113D-156D, (Management Case Study; Transparencies). 1982.

YOUR WORKING LIFE: A GUIDE TO GETTING AND HOLDING A JOB. McGraw-Hill Book Company, New York, NY. pp. 393-399. 1980.

33.0 **COMPETENCY:** Minimizes business risk and losses.

33.2 **TASK:** Identifies the types of insurance needed by a business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a proposed new business,

EVALUATION: identifies the types of insurance needed by a business.

STANDARD: The major types of insurance will include: (as appropriate) fire insurance, liability insurance, workmen's compensation, fidelity bonds, business interruption insurance, crime insurance, business life insurance and automobile insurance.

STUDENT LEARNING EXPERIENCES:

1. Describe the importance of insurance for long term financial stability.
2. Define each of the following types of insurance:
   - Fire
   - Liability
   - Workman's Compensation
   - Fidelity Bonds
   - Business Interruption
   - Crime
   - Business Life
   - Automobile
3. Explain the importance of each type of insurance to small business owner.
4. List the risks which a specific small business will face, and determine if each is insurable.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite an insurance agent to speak to the class on the major types of insurances needed by a small business owner.
2. Divide the class into eight groups. Have each group research one major type of insurance. Groups then make posters/handouts for the class describing purpose and subcatagories of their assigned insurance type.
3. Students interview an insurance agent to determine major types of insurances.
4. Have students participate in "decision game" involving simple business situations involving insurance (referenced below).

INSTRUCTONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Posterboard.

RESOURCE:

Church, Olive D., ENTREPRENEURSHIP: STEP-BY-STEP, J. Eston Walch Publisher, Portland, ME. p. 16. 1986. (decision making game).

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, Gregg/McGraw-Hill, New York, NY. pp. 386-94. 1986.

Lyons, Barbara Jean, BUSINESS MANAGEMENT AND OWNERSHIP, Oklahoma State Board of Education, Stillwater, OK. p. BM0167-6 (insurance checklist). 1979.

PACE, Levels 1 and 2, Unit 18

SPECIALIZED SMALL BUSINESS MANAGEMENT FOR TRADE, INDUSTRIAL AND TECHNICAL AREAS, The Southeast Network for Curriculum Development, Vol. I, Mississippi State, MS. p. 76-78.

33.0 **COMPETENCY:** Minimizes business risk and losses.

33.3 TASK: Develops a plan for protection against business crime.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a proposed new business,

EVALUATION: develops a plan, for protection against business crime.

STANDARD: The plan for protection against business crime will include: shoplifting, bad checks, burglary, robbery, vendor theft, pilferage, and embezzlement.

STUDENT LEARNING EXPERIENCES:

1. List the most common types of business crime.
2. Define why employee theft in a small business is a problem and how it can be minimized.
3. Identify procedures that small business owners can use to reduce bad check losses.
4. Develop a check cashing policy for a proposed business.
5. Describe ways for securing premises against burglary and robbery.
6. Develop a set of rules for employees to follow in case of robbery.
7. Describe ways to guard the store's cash in or due to prevent burglary.
8. Define vendor theft and describe procedures to reduce vendor theft.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a store security manager to be a guest speaker on prevention of, and employee theft.
2. Invite a bank representative to give a presentation on guarding cash, check casing guidelines, and accepting credit cards for purchases.
3. Invite a liaison officer from the local police department to be a guest speaker in burglary and robbery prevention for the small business owner.
4. Ask a receiving manager for a local store to discuss with the class their controls on vendor theft.
5. Divide students into groups of similar types of business interests. Outline procedures that could be used to minimize risk areas listed.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, Gregg/McGraw-Hill Book Company, New York, NY. pp. 387-94. 1986.

Meyer, Warren G., RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. Chapter 21 and 31. 1982.

Rowe, Kenneth L. and Roger Hutt, PREPARING FOR ENTREPRENEURSHIP, AZ Dept. of Educ., Phoenix, AZ. pp. 298-302, 1979.

PACE, Levels 1 and 2, Unit 18.

SPECIALIZED SMALL BUSINESS MANAGEMENT FOR TRADE, INDUSTRIAL AND TECHNICAL AREAS, The Southeast Network for Curriculum Development, pp.75-76.

33.0 **COMPETENCY:** Identify steps businesses can take to protect themselves against risks and losses.

33.4 **TASK:** Develops procedures to reduce shrinkage, waste, shoplifting and theft.

PERFORMANCE OBJECTIVE:

CONDITION: Given a real or simulated employment situation for a designated period of time,

EVALUATION: develops procedures to reduce shrinkage, waste, shoplifting, and theft.

STANDARD: Student evidences procedures evaluated by employer or supervisor.

STUDENT LEARNING EXPERIENCES:

1. Describe the significance of shoplifting to retail businesses.
2. Describe methods used by shoplifters.
3. Describe methods businesses used to minimize shoplifting.
4. Describe steps to follow in apprehending a shoplifter.
5. Describe causes of shrinkage (other than theft) and how they can be reduced.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a store security manager to be a guest speaker on prevention of shoplifting.

2. Invite liaison officer from local police department to present role-playing situations for legal apprehension of shoplifters.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Posterboard and marking pens for anti-shoplifting posters.

RESOURCES:

Mason, Ralph, Patricia Rath, Stewart Husted. MARKETING PRACTICES AND PRINCIPLES, McGraw-Hill Book Company, New York, NY. pp. 387-94. 1986.

Meyer, Warren G., Peter Haines, E. Edward Harris. RETAILING PRINCIPLES AND PRACTICES, McGraw-Hill Book Company, New York, NY. Chapter 21. 1982.

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A college textbook.

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AMERICAN DEMOGRAPHICS. P.O. Box 6543, Syracuse, NY. 13271-9985.

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APPROACHING MACINTOSH. Addison-Wesley Publishing Co., Menlo Park, CA. 1986.

A text on the use of the MacIntosh computer applications.

ARIZONA CONSUMER EDUCATION CURRICULUM GUIDE. Arizona Department of Education, Division of Career and Vocational Education. 1980.

A curriculum guide.

Bellanca, Fogerty, Opeka. PATTERNS FOR THINKING. Illinois Renewal Institute. 1986.

Bikkie, James A. CAREERS IN MARKETING. Mc-Graw Hill, NY. 1978.

A text/workbook in the OMPM series.

Bodle and Corey. RETAIL SELLING. Gregg/McGraw-Hill, New York, NY. 1977.

Bolles, Richard N. WHAT COLOR IS YOUR PARACHUTE? Ten Speed Press, Berkley, CA. 1982.

An excellent reference on the process of selecting a career, obtaining a job, and making life transitions.

Research in Vocational Education. Ohio State University. Columbus, OH. 1985.

A curriculum guide, emphasises adult learners preparing for entrepreneurship.

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CASHING CHECKS. 5th Edition. National Cash Register Co., Dayton, OH 1978.

A text/workbook on check cashing procedures.

Church, Olive D. ENTREPRENEURSHIP STEP BY STEP. J. Weston Walch, Portland, ME. 1986.

A text/workbook with student activities.

Clayton and Brown. ECONOMICS PRINCIPLES AND PRACTICES. Glencoe Publishing Co., Encino, CA.

A high school economics textbook.

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Reference book.

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BUSINESS DYNAMICS. Glencoe Publishing Co., Encino, CA. 1982.

CONSUMER GUIDE TO FOOD LABELS. Consumer Information Catalog. P.O. Box 100, Pueblo, CO. 81002.

A pamphlet of legal information concerning labeling.

Consumer Information Center, Pueblo, CO. 81009.

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Davis, Rodney and Kay Brown. REAL ESTATE. McGraw-Hill, New York, NY. 1979.

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Dible, Donald M. BUSINESS STARTUP BASICS. The Entrepreneur Press, Fairfield, CA. 1978.

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DICTIONARY OF OCCUPATIONAL TITLES. U.S. Department of Labor.

Washington, D.C. 1986-87.

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Ditzenberger, Roger and John Kidney. SELLING: HELPING CUSTOMERS BUY. South-Western Publishing Co., Cincinatti, OH. 1986.

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Dorr, Eugene, MERCHANDISING, McGraw-Hill, NY. 1978.

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ECONOMICS LAPS (IDECC) Mark Ed. Resource Center, Ohio State University. Columbus, OH.

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A text/workbook.

Ernest J. BASIC SELLING. Gregg Division McGraw-Hill, New York, NY. 1978.

Text/workbook.

Ertel, Kenneth A. WHOLESALING AND PHYSICAL DISTRIBUTION. McGraw-Hill, New York, NY. 1978.

A text/workbook in the OMPM series.

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western, Cincinnati, OH. 1979.

High School text on business management.

EXPENSES IN RETAIL BUSINESS. National Cash Register Co., Dayton, OH. 1979.

An excellent resource on business costs, ratios, and expenses.

Fallek, Max. HOW TO SET UP YOUR OWN SMALL BUSINESS, Vol. I. American Institute of Small Business, Minneapolis, MN. 1987.

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Provides a variety of pamphlets and other information suitable as classroom resources.

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FRANCHISE ANNUAL. Info Press, 736 Center Street, Lewiston, NY. 10492.

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A text on small business management and entrepreneurship.

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A paperback dealing with the aspects of marketing research.

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A source dealing with the basic operational tasks of the cashier.

Himstreet, William C., Leonard Porter, and Gerald Maxwell. BUSINESS ENGLISH IN COMMUNICATIONS. Prentice-Hall, Englewood Cliffs, NJ. 1975.

A source of activities dealing with communication skills.

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A series of student modules with teacher resources and pre/post tests.
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An excellent resource, has activities for oral and written communications.

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